



Community OS Quick Reference Style Guide for Agency Registered Users

3 simple numbers.
1 helpful voice.

Agency Information

Use the "Save Agency" button located on the bottom of this screen to save any edits to this agency profile.

Agency Name: NOTE: Agency Names are used throughout the system to identify users and connect services and programs. It is suggested that the name only be edited when it is absolutely necessary.

Agency ID:

Mission:

Description of Agency:

History:

Intended Participants:

Keywords:

Aliases:

Data Element: Agency Name

This is the full legal name of the organization that provides the programs/services that are being included within the resource database. Uppercase and Lower Case (Title Case) format should be used. Terms such as "of", "at", or "as", etc. should be in lower case.

Examples of Preferred Styles:

California Health Advocates	Public Library, City of Chula Vista
Saint Vincent de Paul Society	Public Works Department, County of San Diego

Mission: Statement of Agency's goal.

Data Element: Agency – Description:

Examples of Preferred Styles:

- Offers a variety of programs for Chula Vista residents that promote health, engage youth, and encourage community involvement.
- Multi-service agency operating a variety of neighborhood programs, services and support.
- Social and recreational service agency for young people. Affiliated with Boys and Girls Clubs of America.

History: The agency's history can be summarized within a paragraph.

Data Element: Agency – Aliases (AKA)

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

Examples of Preferred Styles:

San Diego State University – SDSU
Aging & Independent Services – AIS, Area Agency on Aging, San Diego County

Agency Type: Private, Nonprofit, 501(c) 3

Data Element: Agency – Agency Type

The legal status of an organization is the designation indicating the type of organization or conditions under which the organization is operating.

Examples of Preferred Styles:

Nonprofit – Incorporated	Commercial	Government – State
Faith-based	Government – City	Special District
Coalition	Government – County	
Cooperative	Government – Federal	

If non-profit, select IRS legal Tax Classification

501 (a)	501(c)3	501(c)25
501 (c)1	501(c)4	Other
501(c) 2	501(c)5	

Licensed By: State of California

Data Element: Agency – Licenses or Accreditations

If an agency operates either with or because of a license or accreditation secured through a recognized external entity, then this should be recognized within the I&R database record.

Examples of Preferred Styles:	Licensed home care provider	Accredited by Red State
	Licensed child care center	Hospitals Board

Funded By: Donations, County of San Diego

Data Element: Agency – Funded By

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

Examples of Preferred Styles:	County of San Diego
United Way of San Diego County	Community Services Department, San Diego County
Bobby’s Big Bucks Foundation	

Location: East

Data Element: Agency – Location

The agencies location as defined by the county HHSA service regions.

Physical Site Address 1: 1234 2nd Street, Suite 101

Physical Site Address 2:

Physical Site City: El Cajon

Physical Site State: CA

Physical Site Zip: 92021

Mailing Address Attn To:

Mailing Address 1: PO Box 1234

Mailing Address 2:

Mailing City: El Cajon

Mailing State: CA

Mailing Zip: 92021

Data Element: Agency – Street/Physical Address, Mailing Address Attention To, Mailing Address – Examples of Preferred Styles:

- 100 Main Street, Suite 400
City Hall, La Mesa, CA 91941
- 100 Main Street West, 7th Floor, San Diego, CA 92101
- 9206 Willow Street NW, Unit 470, Encinitas, CA 92024-9999
- 9206 South Willow Street W, 4th Floor, San Diego, CA 92107-1112
- Human Resources
PO Box 45, Ironton, MA 68573

Main Phone:	<input type="text" value="(555) 555-5555"/>
Fax:	<input type="text" value="(555) 555-1111"/>
Email:	<input type="text" value="information@exampleagency.org"/>
Web Address:	<input type="text" value="www.exampleagency.org"/>
TDD Phone:	<input type="text"/>
Hotline Phone:	<input type="text"/>
Emergency/After Hours Phone:	<input type="text"/>
Other Phone:	<input type="text" value="(555) 555-2222 ext. 123"/>
Hours of Operation:	<input type="text" value="8:00 am-5:00 pm Monday-Friday"/>

Director's Title:	<input type="radio"/> None <input checked="" type="radio"/> Mr. <input type="radio"/> Mrs. <input type="radio"/> Ms. <input type="radio"/> Dr.
Director's First:	<input type="text" value="John"/>
Director's Last:	<input type="text" value="Smith"/>
Director's Position:	<input type="text" value="CEO"/>
Director's Phone:	<input type="text" value="(555) 555-4444"/>
Director's Email:	<input type="text" value="jsmith@exampleagency.org"/>

Contact's Title:	<input checked="" type="radio"/> None <input type="radio"/> Mr. <input type="radio"/> Mrs. <input type="radio"/> Ms. <input type="radio"/> Dr.
Contact's First:	<input type="text"/>
Contact's Last:	<input type="text"/>
Contact's Position:	<input type="text"/>
Contact's Phone:	<input type="text"/>
Contact's Email:	<input type="text"/>

Data Element: Agency - Phone Number(s)

Agency Phone Number(s) including Extensions:

The phone number(s) through which a particular site or a service operated by that site can be reached. Phone data includes phone numbers, extensions, TDD lines, hotlines, and fax lines.

Examples of Preferred styles: (800) 9760-976
 2-1-1 (800) 453-7669 (800) HELP-NOW
 (250) 467-9836 (111) 222-3333 ext. 123

Data Element: Agency – E-Mail Address

A place to direct online/electronic correspondence.

Data Element: Agency – Web Site(s)/URL(s)

The agency URL should be the official main web site of the organization. Do not include both "http://" and "www." at the beginning of entry.

Examples of Preferred styles: www.airs.org www.211sandiego.org
 http://airs.org

Data Element: Agency – Administrative Hours of Operation

This refers to the general hours the administration office is open. (i.e. office hours)

Examples of Preferred styles: •9:00 am-5:00 pm Monday-Thursday;
 •9:00 am-5:00 pm Monday-Friday 9:00 am-12:00 pm and 6:00 pm-9:00 pm
 •9:00 am-2:00 pm Saturday Friday
 •8:30 am-4:30 pm Monday-Tuesday, and •8:30 am-4:30 pm Monday-Friday
 Friday (Closed lunch 12:00 pm-1:00 pm)
 •9:00 am-2:00 pm, First and third Friday •24 hours a day, 7 days a week
 of each month.

Data Element: Agency or Primary Agency Contact Information

Director - Head of an agency. This person is the individual who is ultimately accountable for its operation.

Examples of Preferred styles: Chief Medical Officer
 Dr. Jenny A Jenkins Administrator
 Father John Seymour Owner
 Mrs. Anne Hughes-Simmons Coordinator
 President and CEO Program Coordinator

Logo:

Current Logo

or [Cancel](#)

Languages Spoken:

Last Complete Agency Update Date: 12/03/2012

Parent Organization:

Agency Registered User:

Partnership Affiliation:

Employer Identification Number:

12-3456789

Staff Note:

9/11/12 CL

Logo: Agency can upload own logo.

Data Element: Agency – Languages Spoken other than English

Example: Spanish; Arabic

Data Element: Agency – Last Complete Agency Update: Enter the date that the agency last updated or reviewed ALL of their respective listings.

Example: 12/03/2012

Data Element: Agency – Parent Organization

This refers to agencies that are part of a bigger entity. County of San Diego is a parent organization to the County Department of Public Works.

Agency Registered User– Select “Yes” if agency has a registered user account.

Data Element: Agency – Federal Employer Identification Number (EIN-FEIN)

A Federal Employer Identification Number (FEIN), is a unique nine digit number (XX-XXXXXXX) that the IRS (United States Internal Revenue Service) assigns to business entities. The IRS uses this number to identify taxpayers that are required to file various returns.

Staff Notes: This is a text field is intended to be used internally when staff wants to communicate changes to a particular agency. Staff making notes will note the date, initials and message.

Moderator's Note:



Moderator Notes: This is a text field that is intended to be used when an agency is an internet resource or does not need to be updated annually.

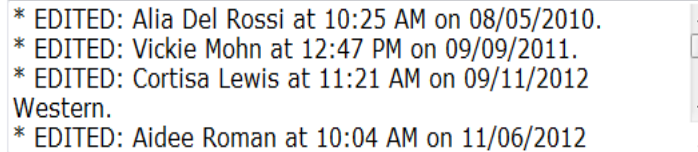
Examples:

*Internet resource. Find updates online.

*Agency does not need annual update.

Note: Other notes pertaining to the status of an agency

Edit Notes:



* EDITED: Alia Del Rossi at 10:25 AM on 08/05/2010.
* EDITED: Vickie Mohn at 12:47 PM on 09/09/2011.
* EDITED: Cortisa Lewis at 11:21 AM on 09/11/2012
Western.
* EDITED: Aidee Roman at 10:04 AM on 11/06/2012

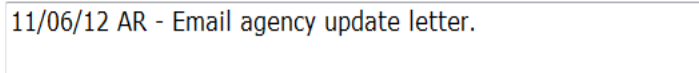
Edit Notes: When a record has been modified or if a partial update has been made, this data element automatically saves the person's name, time, Only staff and authorized agency contacts that have administrative access to their agency's listing have the ability to "Edit" a record.

System defined as:

* EDITED: Volunteer Resource Center at 12:51 PM on 08/23/2010.

* EDITED: Rodney Sackett at 02:03 PM on 08/23/2010.

Last Update/Review Date:



11/06/12 AR - Email agency update letter.

Last Update/Review Date: This is a text field that is used to capture additional comments about the edit notes. In addition, this field is also used to track when an attempt to update has been made or when a complete agency update was made.

Preferred style examples for modifications or partial updates:

08/17/10 AR – Changed email address of update contact.

Preferred style examples for annual update attempts:

08/17/10 AR - Attempt 1 - Aidee emailed annual update letter to agency.

Preferred style examples for complete agency updates:

08/17/10 AR – Complete agency update made by agency contact.

Note: Other notes pertaining to updates made to the agency, program, or services may be entered on a case by case basis.

Update Cycle:

None
 Annually
 Biannually
 Quarterly
 Monthly
 Weekly

Update Contact Name:

Update Contact Email:

Update Contact Phone:

Update Contact Fax:

Portal Restrictions:

No Restriction (National Resource)
 Restrict to:

211 access
 211 San Diego (default)
 WVSD

Public Access

This profile can currently be viewed by the public.

Publishing: Profile is **PUBLISHED**.
 Publisher: ▼

Status: ▼
 Only "Active" profiles are shown to the public.

Start Display Date: (MM/DD/YYYY)

End Display Date: (MM/DD/YYYY)

Hide Director Information:

Update Cycle:
 Select quarterly update cycle. This will ensure that the agency receives a notification to update their listing quarterly.

Update Contact:
 Update Contact – Person in charge of making updates and changes to agency, program, and services. Larger agencies may require different contact per department or program. If that is the case, the Update Contact may be found under the Program or Service Level.

Data Element: Agency – Portal Restrictions
 Select appropriate portal to share the Agency information. Currently 211 San Diego is the default portal, however it is possible to share the information with more than one portal.

Data Element: Agency – Public Access/Agency Status
 Select agency status on drop down.

Publisher: Selecting “publishers” gives authorization to have an agency updated by a designated person from external agencies.

Status: Select agency status on drop down. If agency is active, it is displayed to the public. If inactive or other, agency does not display to the public or Customer Service Representatives.

Start Display Date: Select display date for agency if applicable.

End Display Date: Select end display date for agency if applicable.

Hide Director Information: Click box to hide Director’s contact information.

Program Information

Program Name:

New Program

Data Element: Program— Program Name

This refers to the specific name of the program. The Program Name is the proper name for a service or group of services that is specified by the agency, rather than created by the I&R service. Uppercase and Lower Case (Title Case) format should be used. Terms such as “of”, “at”, or “as”, etc. should be in lower case.

Examples of Preferred Styles:

Employability	Mental Health Assessment Services
Family Literacy Program	Substance Abuse Prevention Program
Head Start	Utility Assistance Program

Description of Program:

Provides emergency food, clothing and personal hygiene products to families in the east county. Clients can also sign up for transitional case management services that offers assistance to job training as well as food stamp, medical, and section 8 housing application assistance.

Data Element: Program— Program Description

A program 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.

Staff Note:

02/15/11 SG - Edit made to the update contact name, phone number and email.

Data Element: Service - Staff Notes

Use this field to write in notes for Resource Center staff only.

Update Cycle:

- None
- Annually
- Biannually
- Quarterly
- Monthly
- Weekly

Update Contact Name:

Jane Doe, Programs Director

Update Contact Email:

jdoe@exampleagency.org

Update Contact Phone:

(555) 555-3333

Update Contact Fax:

Data Element: Program - Update Contact Information (if applicable)

This refer to the person in charge of making updates pertaining to a particular program (i.e. program director, program coordinator, etc)

Public Access

This profile can currently be viewed by the public.

Publishing:

Profile is **PUBLISHED**.

Publisher: **Publishers**

Status:

Active

Only "Active" profiles are shown to the public.

Start Display Date:

(MM/DD/YYYY)

End Display Date:

(MM/DD/YYYY)

Hide Director Information:

Hide Contact Information:

Save Program

Reset Fields

Data Element: Program – Public Access/Program Status

Status: Select agency status on drop down. If agency is active, it is displayed to the public. If inactive or other, agency does not display to the public or Customer Service Representatives.

Start Display Date: Select display date for agency if applicable.

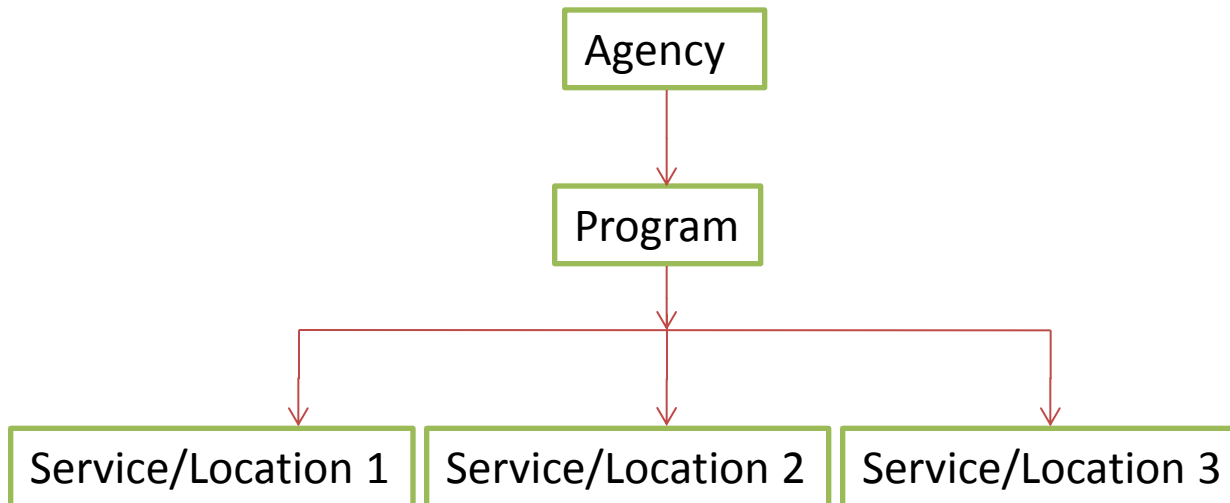
End Display Date: Select end display date for agency if applicable.

Attention!

If you update a program's information, it is required that you also update the information under service.

Our 211 Contact Center refers to service sites for detailed information about a program including eligibility, intake, address, hours and days, etc. It is essential that the service information is updated to each program under your agency profile.

- **Please note:** If the program is offered at multiple locations you must update the service site for each location.



Service Information

Service Name:	Information and Referral Services, 2-1-1
Service ID:	S652775
Description of Service:	Provides comprehensive, confidential phone-based information and referral (I&R) services, focused on health and social service programs in the San Diego region. Maintains a search-able website of information about health and social service programs. Offers I&R training programs to agencies and organizations, including problem assessment, needs identification, client referral, and followup.
Urgent Services Provided:	
Keywords:	Access and Functional Needs AFN population 211 San Diego Grandfamilies I&R 2-1-1 San Diego
Aliases:	211 San Diego, Infoline of San Diego

Data Element: Service – Service Name

This refers to the specific name of the Service. The Service Name is the proper name for a service location that is specified by the agency, rather than created by the I&R service. Generally this will use the same name of the program along with an identifier for the physical location where the service is offered.

Examples of Preferred Styles:

- Medi-Cal, Center City Family Resource Center
- Emergency Food Assistance Program (EFAP), Community Food Bank of National City

Data Element: Service – Service Description - Examples of Preferred Styles:

- Offers a self help group for alcoholics. Regular meetings at a variety of times and locations throughout Rockland County.
- Works with Green State Department of Labor to secure placements, part-time and full-time employment for Grey County Community College students and alumni.
- Offers financial assistance in emergency situations and assistance in enrolment in AIDS Drug Assistance Program (ADAP).

Data Element: Service – Keywords

Keywords are special tags used to identify specific service types/taxonomy groups to aid search results.

Data Element: Service – Alias

Aliases for the agency name, site name or program name, or names that are acronyms, former names, popular names or other alternative names. An AKA may also be any type of name under which the organization, site or program might reasonably be searched by a user.

Location:

Geographic Area:

Data Element: Service – Location

This refers to the HHS Region in which a service location is physically located.

Data Element: Service – Geographic Area/Areas Served

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

Data Element: Service-Geographic Area/Areas Served-Examples of Preferred Styles:

- City of San Diego
- Zip codes: 43204, 43207 and 43311
- HHS Regions: East, North Inland, North Coastal, North Central, South, Central (Metro)

Public Transportation:

Facility/ADA Access:

Data Element: Service – Public Transportation

This refers to any specific public transportation information relative to program access or location.

Data Element: Service – Facility/ADA Access

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

Intake Procedure:

Intake Requirements:

Additional Requirements:

Data Element: Service – Intake Procedure, Intake Requirements, Additional Requirement

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

Examples of Preferred Styles:	Walk-in	Email
Call	Phone or Walk-in	Online
	Referral required	

Eligibility:

Data Element: Service - Eligibility

These are the guidelines that a service provider uses to determine who is qualified to receive services. Eligibility can be stated in terms of requirements.

Examples of Preferred Styles:	Men 18 years and older
If there are no eligibility requirements enter “No restrictions”.	4 years to 12 years
18 years and younger	55 years and older residing in the City of Escondido
Residents of La Mesa	People living with AIDS/HIV and their Caregivers
Women with Children	

Helpful Tips:

Data Element: Service - Helpful Tips

This refer to any additional notes, ideas, or other information related to service that the client may find useful.

Intended Participants:

Target Population:

Age Group:

Gender:

 Male Female Either

Income Notes:

This field is not in use

Driver's License:

 Required Not Required

Other:

Types of Fees:

Fee Amounts:

Insurance Accepted:

Payment Notes:

Capacity Limitations:

Number of Openings:

Wait List:

Languages Spoken:

Data Element: Service – Intended Participants

This refers to the individuals whom the particular services is intended for when more than one Target Population is present.

Data Element: Service – Target Populations

This refers to the individuals for whom a particular service or group of services is intended.

Data Element: Service – Age Group

This refers to the age group the program is intended for.

Data Element: Service – Gender

Select gender if the program is gender specific.

Data Element: Service – Driver's License

If driver's license is requirement.

Data Element: Service– Fee Structure/Insurance Accepted

The fee structure is an outline of the cost of receiving a service. Insurance accepted refers to whether the agency accepts insurance or not. Payment notes field is used to identify the type of insurance the programs accepts and additional notes pertaining to the fee amount payment or insurance accepted.

Examples of Preferred styles:

Types of Fees:

- No fees.
- Fixed fee schedule.
- No fees. Donations accepted.
- Please call for fee information.
- Sliding scale fees based on family size and income.
- Variable fees depending on

service.

Fee Amounts:

- Membership fee
- Range from \$20-\$40
- Start at \$25

Insurance Accepted:

- Yes
- No

Payment Notes:

- Cash
- Money Order
- Credit Card
- Check
- Private insurance
- Healthy Families
- No one if refused services due to inability to pay
- Call for details.

Data Element: Service - Capacity Limitations

This refers to the "amount" of capacity available.

Data Element: Service – Number of Openings

This refers to the availability of the number of openings available at a given period of time. This number changes according to the agency's specifications. Commonly used under shelter and mental health board and care options.

Data Element: Service – Wait List

This is in reference for the "amount" of time a client will have to wait for an application to process or to get into a specific program.

Data Element: Service – Languages other than English

The specific languages, other than English, which are consistently available at a location.

Physical Site Address 1:	1234 2nd Street, Suite 101
Physical Site Address 2:	
Physical Site City:	El Cajon
Physical Site State:	CA
Physical Site Zip:	92021
Mailing Address Attn To:	Programs Director
Mailing Address 1:	PO Box 1234
Mailing Address 2:	
Mailing City:	El Cajon
Mailing State:	CA
Mailing Zip:	92021
Main Phone:	(555) 555-5555
Alternate Phone:	<i>This field is not in use</i>
Other Phone:	(555) 555-2222 ext. 123
Fax:	(555) 555-1111
Web Address:	www.exampleagency.org
Service Location Email:	information@exampleagency.org
TDD Phone:	
Hotline Phone:	
Emergency/After Hours Phone:	

Data Element: Site – Street/Physical Address, Mailing Address Attention To, Mailing Address – Examples of Preferred Styles:

- 100 Main Street, Suite 400
City Hall, La Mesa, CA 91941
- 100 Main Street West, 7th Floor, San Diego, CA 92101
- 9206 Willow Street NW, Unit 470, Encinitas, CA 92024-9999
- 9206 South Willow Street W, 4th Floor, San Diego, CA 92107-1112
- Human Resources
PO Box 45, Ironton, MA 68573

Data Element: Service - Phone Number(s)
Agency Phone Number(s) including Extensions:
 The phone number(s) through which a particular site or a service operated by that site can be reached. Phone data includes phone numbers, extensions, TDD lines, hotlines, and fax lines.

Examples of Preferred styles:

	(800) 9760-976
2-1-1	(800) 453-7669 (800) HELP-NOW
(250) 467-9836	(111) 222-3333 ext. 123

Data Element: Service – Web Site(s)/URL(s)
 The agency URL should be the official main web site of the organization. Do not include both “http://” and “www.” at the beginning of entry.

Examples of Preferred styles:

www.airs.org
 http://airs.org

Data Element: Service – E-Mail Address(es)
 info@exampleagency.org

Availability

Hours of Operation:

24-hours, 7 days a week

Monday Tuesday Wednesday Thursday Friday
 Saturday Sunday

Mornings Afternoons Evenings Nights

January July

February August

March September

April October

May November

June December

Specific Hours:

Data Element: Service – Hours of Operation

This refers to the days and times an individual can access a service. May be the same as the administrative office hours and days of operation. Select check boxes that are applicable to the hours, days, time of day and months of operation. **Specific Hours:** Use this field if the intake hours of the program are different than the time the program is operating (i.e. if the service operates from 8:00 am-4:00 pm and the office is opened until 2:00 pm, then the specific intake hours should be 8:00 am-2:00 pm.

Examples of Preferred styles:

•9:00 am-5:00 pm Monday-Friday

•9:00 am-2:00 pm Saturday

•8:30 am-4:30 pm Monday-Tuesday, and Friday

•9:00 am-2:00 pm, First and third Friday of each month.

•9:00 am-5:00 pm Monday-Thursday; 9:00 am-12:00 pm and 6:00 pm-9:00 pm Friday

•8:30 am-4:30 pm Monday-Friday (Closed lunch 12:00 pm-1:00 pm)

•24 hours a day, 7 days a week

Helpful Tips:

6am-12pm (Mornings) 12pm-5pm (Afternoons) 6pm-9pm (Evenings) 10pm-5am (Night)

***Specific Hours:** Use this field if the intake hours of the program are different than the time the program is operating (i.e. if the service operates from 8:00 am-2:00 pm and the office is opened until 4:00 pm, then the specific program hours are 8:00 am-2:00 pm).

Court Approved:

Seasonal Program:

Funding Source:

CalFresh Tier :

Court Approved

Click check box if service is court approved (court approved as stated by agency or program).

Seasonal Program

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

Data Element: Service – Funding Source

The source of funds indicates the entities that fund of this service and/or the type of funding received by a program/service. Select from drop down Menu.

CalFresh Tiers

*See CalFresh Tiers grid.

Staff Note:

12/03/12 AR Agency changed phone.]

Last Update/Review Date:

12/03/12 AR - Annual update sent to service contact.

Update Cycle:

- None
 Annually
 Biannually
 Quarterly
 Monthly
 Weekly

Update Contact Name:

Janet Smith, Site Coordinator

Update Contact Email:

janets@exampleagency.org

Update Contact Phone:

(555) 555-8888

Update Contact Fax:**Public Access**

This profile can currently be viewed by the public.

Publishing:

Profile is **PUBLISHED**.
 Publisher: *No Publisher Assigned*

Status:

Active

Only "Active" profiles are shown to the public.

Start Display Date: (MM/DD/YYYY)**End Display Date:** (MM/DD/YYYY)**Hide From Public Search:****Hide From Other Agencies:****Staff Notes:**

This is a text field is intended to be used internally when staff wants to communicate changes to a particular agency. Staff making notes will note the date, initials and message.

Last Update/Review Date: This is a text field that is used to capture additional comments about the edit notes. In addition, this field is also used to track when an attempt to update has been made or when a complete service update was made.

Data Element: Service - Update Cycle

We recommend you update “monthly” however you have the option to update weekly, quarterly or annually. (Please do not select biannually)

Data Element: Service – Update Contact

This is the individual that is the contact for updating a service (for example, the case manager, program coordinator, service coordinator, etc).

Data Element: Agency – Public Access/Service Status

Publisher: Selecting “publishers” gives authorization to have an agency updated by a designated person from external agencies.

Status: Select agency status on drop down. If agency is active, it is displayed to the public. If inactive or other, agency does not display to the public or Customer Service Representatives.

Start Display Date: Select display date for agency if applicable.

End Display Date: Select end display date for agency if applicable.

Hide Director Information: Click box to hide Director’s contact information.



Questions?

Contact our Research and Data Center

(858) 300-1200 or resourcecenter@211sandiego.org

3 simple numbers.
1 helpful voice.