

“Georgia Health – Go Local”

Selection and Indexing Guidelines and Style Guide

Training Manual for Indexers

Updated June 15, 2009

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Project Overview

a) What is Go Local?

- i) Go Local links users to *health services* in their local community and directs users of the Go Local site to MedlinePlus health topics.
- ii) Audience: general public, librarians acting as intermediaries, and health professionals

b) Relationship between MedlinePlus and Go Local

- i) MedlinePlus provides authoritative medical information on diseases, conditions and wellness issues and links users to Go Local sites for nearby health programs, services and providers (think people, places, actions).

c) Designated Go Local Area

- i) Georgia is a designated Go Local Area. A designated Go Local Area is the unit that creates a site that is mapped to a particular portion of the United States. A designated Go Local area may be an entire state (e.g., North Carolina), a portion of a state (e.g., southeastern Ohio), a city (e.g., Los Angeles), or even a grouping of parts of several states (e.g., Tribal area consisting of portions of Arizona, New Mexico, Colorado and Utah.)
- ii) "Georgia Health – Go Local" strives to create a comprehensive database of local health resources, but is not a complete directory of all health services in Georgia. The services included in the Go Local database must have either a phone number or website.

Required preparation for Selectors/Indexers

a) Review the project website: <http://www.gahealthgolocal.org/>

And the Indexer's Tools: <http://gain.mercer.edu/golocal>

b) Study the MedlinePlus site: <http://medlineplus.gov>

i) Pay special attention to the Health Topics:

<http://www.nlm.nih.gov/medlineplus/healthtopics.html>

ii) From the MedlinePlus Health Topics page click on a health topic and you will be taken to a page on that topic. On the right side of the page, notice the Go Local box. Click on the drop-down box to see available states, select Georgia, and click Go. Notice how you drill down to a specific county, city, or zip code to review the local health services listed for that area.

c) Review the materials at the Go Local Resources website:

<http://www.nlm.nih.gov/medlineplus/golocal/about.html>

d) Use your ID/Password and login to the Go Local Input

system: <http://wwwcf.nlm.nih.gov/mplocal/login.cfm> OR click on the "Go Local Input System" link from <http://gain.mercer.edu/golocal>

i) Review the features of the interface and view records that exist within the system. (A Go Local Administrator will assign your userID and password).

ii) Click on "Approved Records" to look at some examples of correctly indexed records that represent the various resources are in the Go Local system, i.e., hospitals, health departments, programs and services, organizations and associations, conventional health care providers, alternative health care providers, and government sites.

e) Study and gain familiarity with the Georgia county/city list:

http://www.dca.state.ga.us/development/Research/publications/Active_City_List.pdf

f) Technical requirements for Selectors/Indexers

i) Computer with high-speed internet access is highly recommended (NOT a dial-up connection).

- ii) Windows operating system
- iii) Internet Explorer 5.5 (or equivalent browser) or above (see "NLM Go Local Input System for Georgia" manual for specific instructions on how to check your settings)
 - (1) Set to accept cookies
 - (2) ActiveX enabled
 - (3) Set to check for new version of page every time
- iv) Macromedia Flash version 8 (you will be prompted to install if you do not have Flash or if you have an older version)
- v) Other special applications as needed (e.g., RealPlayer, QuickTime, Windows Media Player, Adobe Acrobat reader)

For questions related to technical requirements, please contact Kevin Hatfield, Mercer University Medical Library, HATFIELD_KP@Mercer.edu or 478-301-4132 (email preferred). When asking technical questions, please be as specific as you can so that Kevin can better assess the problem. For example, note exact wording of any error messages you are getting and the process that caused the error messages.

Selection Criteria

a) General guidelines

- i) Go Local selectors should collect services including: state and local health departments, medical centers and clinics, practitioners, libraries, local voluntary health agency chapters, and support groups. Go Local selectors **should NOT collect and index locally-created health information**. The following standards are meant to guide Selectors and Reviewers in choosing which local resources to include in the Go Local system. If selector is uncertain whether a resource should be added, he/she should consult with his/her Indexer Coordinator.
- ii) Resources without websites are eligible for inclusion in the Georgia Go Local system, though an attempt should be made to locate a website for the resource if one is not provided. A resource must either have an address or a phone number to be included.
- iii) Resources selected for inclusion are assessed according to the Selection Checklist (page 12). The sites must be assessed in their totality, and reviewed for inclusion both on their merits, and in relation to the existing collection of resources. Selectors should be familiar with the database, the project and its goals.
- iv) Do not assume that all records in the Incomplete queue meet the selection guidelines. If an Incomplete record does not meet the selection criteria, include a message in the Comments field of the record and Submit to Pending. A Reviewer will then review the resource and, if necessary, delete the record.

b) Authority of site information

- i) The sponsorship of the site should be clear and contact information provided. Preference should be given to those health resources that are under the auspices of an accrediting or licensing agency. The credentials or qualifications of the sponsors should be provided.

c) **Content**

- i) All website pages should contain a created, revised, or update date.
- ii) A resource and/or information on a resource's website should be unique. Another (duplicate) record for the service should not already be present in the Go Local system.
- iii) Any educational information provided by a site should including cited references. Such information should strive for a balanced viewpoint, particularly with respect to sites for complementary therapies/alternative medicine.
- iv) Commercial sites may be included in the Go Local system as long as any commercial interest or personal point of view is made clear—either on the website (if the resource has one) or on the Go Local record Description.
- v) Individual Providers – we are not including individual providers for entry in the Go Local system at this time. However, go ahead and edit, verify, and index them. Indicate in the Comments field that the record is for an individual provider, "Do not display," and "Check for later display." Add any additional notes that may be useful in the Comments field and Submit to Pending. Reviewers will review and, when appropriate, approve these records, but they will leave the Display as "No." For geographical areas with few health resources, we may decide to add records for individual providers.
- vi) Private practices with several physicians may be entered into the Go Local system. Be sure to check for credentials.
- vii) Links on websites must be reliable and relevant to Georgia users.
- viii) When the appropriateness of a record is in question, check to see whether there is a Local Service Term for the resource. If there is, include the resource and add any questions in the Comments field. A Reviewer will then make the final determination as to the record's inclusion or exclusion.

d) **Audience**

- i) Consumers or the general public should be the intended clientele of a resource. If the resource has a website, check graphics, fonts, and for consumer-friendly (not overly technical) language.

e) **Local relevance/geographical coverage**

- i) The site should provide information about a local or regional organization, service, or activity.
- ii) Selectors/Indexers should focus on the services and resources to which they were assigned. (Note: This may include some services that have statewide, regional, or sometimes even nationwide service reach.)

f) **Websites**

- i) Website design is consistent and clear
- ii) Website structure is logical and easy to navigate

g) **Prioritizing health topics and services**

- i) Enter records associated with the top ranking “causes of death” in Georgia first as a priority. Those rankings may be found online at <http://webapp.cdc.gov/cgi-bin/broker.exe> , and are as follows:

Heart disease
 Malignant Neoplasms (cancer)
 Cerebrovascular diseases (stroke)
 Chronic Lower Respiratory Disease
 Influenza and Pneumonia
 Diabetes Mellitus
 Alzheimer's Disease
 Nephritis (kidney disease)
 Septicemia (blood poisoning)

- ii) Selectors should also give priority to services that address Georgia's Healthy People 2010 Leading Health Indicators (<http://health.state.ga.us/pdfs/epi/cdiee/healthypeople2010.04.pdf>):

Pneumonia Immunization
 Flu Immunization
 Specific source of ongoing primary care
 Health insurance
 Obesity
 Smoking
 Binge drinking

- iii) Lastly, the Health Information in Georgia survey conducted in 2005 indicated a need for resources related to the following:
- Diagnosis and treatment of conditions and diseases
 - Medications or drugs
 - Prevention and wellness

h) **Multiple records for a single site**

- i) Sometimes, more than one record may be needed for a large site offering many services. To determine when to create multiple records, consider the following (See Deciding how many records to create for a site on page 32):

(1) Ease of navigation (for websites). In other words, when people visit the website, can they easily find all of the services offered? Consider:

- Number of clicks necessary to move to the content on related pages
- Descriptiveness of links to related pages

(2) Distinctiveness

- Are additional local terms or health topics necessary to describe specific service(s) provided by a larger site?
- Check the website and/or www.WhitePages.com and/or www.Switchboard.com to see if there is a separate listing for a service. Particularly if the separate service has a different contact address/phone number from the larger organization, it should be listed in a separate record. However, if the address and phone number for a service are not listed separately from the larger institution, the service term for that particular service should be included in the record for the larger institution.

(3) Quality and uniqueness of information on related pages

- i) **Grounds for exclusion** are any of the following attributes, in the judgment of the selector(s):

(1) Resource sells a product or service or makes health claims and has no recognized medical credential or sponsorship.

(2) Resource is for an individual health care provider and does not include credential information.

(3) Resource presents inaccurate, erroneous, misleading or dangerous medical information, claims, or allegations. This definition would include

questionable ideas as well as questionable products and services, regardless of the sincerity of their promoters.

- (4) Resource is not appropriate for any of the target audience(s), i.e. general public, health care workers, or librarians.
- (5) Resource website (if available) has content that is only available for a charge, or requires an account or a password.
- (6) Resource website (if available) is out of date or not maintained, or is not consistently available, has broken links, or has other technical problems that inhibit use.
- (7) Resource is a duplicate of another record already in the Go Local system.
- (8) No Local Service Term seems to describe the resource. (Note: If you come across a resource you feel should be included but for which no Local Service Term is available, make a note in the Comments field for a Reviewer.)
- (9) For valid resources that are deemed inappropriate for a reason that may change in the future (e.g., out of date or poorly designed website), Submit the record to Pending and set Display to "No." Explain your reason for not displaying in the Comments field. This record will remind us to re-check the website in the future and will also serve as a place holder so other selectors do not try to review the site for inclusion.

Selection checklist:

Use these criteria to assess sites for inclusion. Sites must have one of the attributes in each of the first two sections (Local Relevance and Authority/Source) as well as one or more attributes in the other sections, to merit inclusion in the Go Local database.

Criteria

Local relevance/geographical coverage

- Provides information about a Georgia organization, service or activity
- Resource is on your list of assigned records

Authority/Source

- Contact info is given and has been verified
- Sponsor's credentials or qualifications are provided

Content

- Resource is not a duplicate of a record already present in the Go Local system
- Website pages contain date, revised, or updated date(s)
- Links are reliable and relevant to Georgia users
- Any educational content is cited or the source of the information is provided
- Resource is non-commercial OR if commercial in nature, it acknowledges commercial interest, personal point of view, or other bias
- There is an appropriate Local Service Term to describe the site

Audience

- Consumers or general public are the intended audience of the site

Website (if applicable)

- Design is consistent and clear
- Structure is logical and easy to navigate

**** If an incomplete record does not meet these criteria, include a message in the Comments field of the record that you recommend it for deletion and Submit to Pending. A Reviewer will then review the resource and, if necessary, delete the record. ****

The Input System: Overview

*See "NLM Go Local Input System for Georgia" manual for more on the Input System

a) Sign in page

- i) Go to: <http://wwwcf.nlm.nih.gov/mplocal/login.cfm> (or access this page through the project website, <http://gain.mercer.edu/golocal>, under **Indexer's Toolkit** and **Go Local Input System**)
 - (1) Type in your assigned ID/password.
 - (2) A welcome main page will open with your name and date.

b) What do I do in the system?

- i) Create and/or index records for local health care providers, health facilities, and health care programs and services.

c) Tips for using the Input System

- i) The system will prompt you if you haven't filled out a form properly. For example, if you haven't included a required field such as a zip code or Local Service Term, the system will not let you submit a record.
- ii) It's a good idea to have only one browser at a time running the input system. You can run it in multiple windows, but sometimes things won't work. For example, if you've been editing a record in one window and log out of the second one, when you submit the record from the first window, the system will log you out and your work will be lost.
- iii) If you encounter problems with multiple browser windows, you may need to close all browser windows and start fresh.
- iv) Try not to use the browser's Back button or Refresh Page button.
- v) You can sometimes make multiple selections by using the control-click feature.
- vi) In order for you to be able to change the size of text you see, be sure that under Internet Options, Temporary Internet files, and Settings, "Check for newer versions of stored pages" is set for "Every visit to the page."

d) To enter a new resource

- i) Check for duplicate records. Within the record, click on the Duplicate Check and Similar Check buttons to see if a duplicate or similar record already exists in the system. If another record for the same resource is not found, proceed. If you discover a duplicate record, make a note in the Comments field and suggest that one of the duplicate records be deleted. Submit to Pending queue.
- ii) Verify that the resource meets the Selection Criteria (see Selection Checklist on page 12) for inclusion into the Go Local system. If you are unsure, make a note in the Comments field for a Reviewer.
- iii) If the criteria above are met, proceed to verify, edit, and index the record.

Site Records: Formatting & Indexing Guidelines

a) General guidelines

- i) The terms "site," "resource," and "service" are used interchangeably below to refer to both physical locations of health services as well as their websites, both of which will be included in Georgia's Go Local system.
- ii) The following basic contact information **MUST** be available and verified for all sites entered into the Go Local system:

Site name

Address 1 - (If no address provided, enter "See website or call for location(s)" (without quotes or ending punctuation). Example: Shelters that do not disclose their address for safety reasons.)

City

State

Zip code

Telephone number

b) Verification process

- i) Use the resources available in the "Tools to Help Format and Verify Records" section of the Indexer's Toolbox on the project website (<http://www.gahealthgolocal.org/indexertools.php>)
- ii) If a telephone number is provided, enter it into www.WhitePages.com, www.Switchboard.com, or Google to make sure it is still the number for the site.
- iii) If a URL is *not* provided, perform a Google search and attempt to find a website for the resource. If you are still not able to locate a website, you may call (or email if an email address is available) the site to verify the contact information and services. Indicate your efforts to verify the site's information in the Comments field. Note the date you called the site, as well.
- iv) If a URL *is* provided, check to ensure that the link still works, that it points users to the appropriate information, that the contact information given on the website matches what is entered in the Go Local record, and that the website meets the website evaluation standards in this document. If there is a discrepancy between the website and what you find in Whitepages, Switchboard, or Google, do your best to determine the accurate information. If you are able, email or call the site to verify the contact information and

services. Indicate your efforts to verify the site's information in the Comments field. Note the date you called the site, as well.

c) Name of Site

- i) This field is the first element in the user's display, and is the full name of the resource. Do not confuse with Organization field.
- ii) Do not use all capital letters unless it is relevant to the site name.
- iii) Be sure to use the name of the resource, not the name of a website, although in some cases they may be the same.
- iv) When possible, use the name as given in its fullest official form. If a resource has a website, check the title of the page displayed, title in the browser bar, or the copyright statement at the bottom of the page. Don't use "Welcome to..." or other non-descriptive phrases. Do not alter the way it is presented by inverting the order of elements, changing or adding punctuation, symbols, etc. If varying forms of the name are used on the site, you must determine which one is the most complete and official form of the name.
- v) Always capitalize acronyms and omit their internal punctuation (AHEC not A. H. E. C.)
- vi) Spell out Assoc., Univ. and other commonly abbreviated parts of the name (unlike the Address fields, for which you should always use U.S. Postal abbreviations).
- vii) However, do NOT spell out "Incorporated" unless it is part of the official name. Abbreviate as "Inc."
- viii) If creating multiple records for a resource in multiple locations/chapters, use the full name of the entity combined with the location, chapter, branch or department name separated from the main name with a dash (-). The - should have a single space before and after it.

Examples:

Arthritis Foundation – Northeast Georgia Branch
Arthritis Foundation – Southeast Georgia Branch

Georgia Heart Physicians – Bibb
Georgia Heart Physicians – Dekalb

- ix) If the site name begins with an article (the, an, a), do not include the article in the Site Name field (example: The Pain Clinic would be entered as "Pain Clinic"). For foreign language site names the article remains (example: La Leche League).
- x) Do not use abbreviations unless it is the actual name of the company (IBM).
- xi) Change ampersands (&) in site names to *and*.
- xii) If the record is for a "child" site (meaning, a local chapter or service of a larger organization), avoid including the name of the "parent" organization if that name will display as the Organization.
- xiii) Specific guidelines for personal names (for individual providers, for example):
 - (1) If a website is available, enter the name as given on the website.
 - (2) Set up the name in direct order (Jane Smith not Smith, Jane). Include initials for middle names if they are given, with punctuation, or spell out middle names if they are spelled out.
 - (3) Omit any titles (Dr., Prof. etc.) but include abbreviations for licensure, credentials, certifications, and degrees (MD, RN, DO) associated with the name. Take these exactly as given, but omit internal punctuation within credential names.

Examples:

David E. Paquette, DDS, MS, MSD
Alexandra Hamer, LMBT

Examples of abbreviations for professional credentials and degrees:

ABFP	FACOG
ACSW	FICPP
BCD	FNP
CGSW	FRCSC
CNMW	LCSW
DDS	LMBT
DO	LMFT
FAAFP	LMT
FAAOMPT	LPC

LPT	PA
MA	PAC
MD	PhD
MDIV	PT
MDT	RN
MS	WHCN
MSW	

d) URL of Site

- i) If box next to "Enable URL" is checked, this field will be displayed to the user to permit access to additional online information about the resource.
- ii) If a URL is NOT provided, perform a Google search and attempt to find a website for the resource.
- iii) Enter the URL to ensure it is still functioning and associated with the resource (follow verification process above). If it is, copy and paste the complete URL from the browser's address bar (including http://). You should omit unnecessary extensions, however, such as "index.html." (Open a new window and test the URL if you are unsure.)
- iv) Be sure the resource's website contains a logo or other identifying information so the user will know the source of the information.
- v) Bypass an "Intro" page if the website opens to one. Instead, point directly to a page with content unless this page does not include identifying information.
- vi) Use the most direct URL: use Deaconess Hospital Respiratory Services page <http://www.deaconess.com/bodyframe/body.cfm?id=1037> instead of the URL for the hospital, <http://www.deaconess.com/>
- vii) Do not use a URL that is a "search result."
- viii) Use only web pages for local health *services*. Do not add/index records about health *conditions*.
- ix) Beware of framed websites. The unique URL for pages within a framed website may not appear in the browser's location bar. Open framed sites in a new window and copy and paste the resultant URL from the browser's location bar into the Go Local record. To open a site in a new window:
 - (1) Right click on the link to the new site (i.e. the link as displayed on the parent organization's page)

- (2) A menu should display; left click on 'Open in New Window'
- (3) Example: <http://www.uhhg.org/> - click on 'Services'; right click on the 'Ambulatory Care' link; from the displayed menu, left click on 'Open in New Window;' the URL in the new window is the one to copy and insert into the Go Local record.

e) Addresses

i) Address 1 field is required.

- (1) When there is a street address and an alternate P.O. Box address, use the street address in the Address 1 field and the P.O. Box number in the Address 2 field.
- (2) If only a P.O. Box address is available, attempt to find a street address. If successful in finding a street address, follow guideline above: d), i), (1).
- (3) If it appears that only a P.O. Box address is available for a site, enter the P.O. Box number in the Address 1 field.
- (4) If a service, such as Alcoholic Anonymous, meets at a certain location, such as a church, the name of the church may be entered in the Address 1 field and its street address (or P.O. Box number if no street address is available) may be entered into the Address 2 field. However, if the physical location (in this example, the name of the church) is indicated in the Name of Site field, do not re-enter it in the Address 1 field.
- (5) If a resource, like a shelter or support group, has no public address for reasons of safety and security, enter: "See website or call for location(s)" in the Address 1 field. Do not include the quotes, begin with a capital letter, and do not put a period at the end. You must still enter the most appropriate City, State and Zip code and either a website or phone number.
- (6) You may use an intersection of two streets as the Address 1 field if that is what the service lists as its location. (Note: It IS permissible to use the & (ampersand) symbol in this field to indicate intersections, unlike the Site Name field.) List intersections as noted below, using "&" to denote the intersection:

Example: E. 11th St. & Central Ave.

- ii) Use the U.S. Postal Service list of approved abbreviations for common address formats (found here: www.usps.com/ncsc/lookups/usps_abbreviations.htm). However, do not capitalize or add punctuation to these abbreviations. For example, Circle is listed as "CIR" in the postal abbreviations list while the proper format for Go Local records is "Cir" (with first letter capitalized and a period after the abbreviation). Other examples: St. for Street, Dr. for Drive., Hwy. for Highway, and Ste. for Suite.
- iii) Abbreviate and punctuate directions that precede or follow the name of a street, such as North, South, Northeast, etc. Use a capital letter followed by a period, such as N. Ross St. or Ross St. N.E.
- iv) Address 2 field is used as necessary (for Suites, etc.).
- v) City: Spell city name completely (required field).
- vi) State: Most entries will be Georgia; bordering states may be selected if the resource has an overlapping coverage area (required field).
- vii) Zip Code: first 5 digits required.

f) Phone

- i) Enter complete, primary phone number that is appropriate for consumers. Include both the local and toll free number, if one is available.
- ii) Format: 555-555-5555
- iii) Use phone numbers as given: acceptable to use ALPHA characters, i.e.: 866-GET-FOLIC.
- iv) Special phone number formatting notes:
 - (1) Indicate toll free numbers with the words "Toll free" directly in front of the toll free number, without a colon. Omit the "1" before the "800" or toll free area code.

Example: Toll free 800-555-5555
 - (2) When including two or more phone numbers use a semi-colon and space between each number. List the local number first and the Toll free number second:

Example: 555-555-5555; Toll free 800-555-5555

- (3) Indicate crisis or hot line numbers with a note preceding the telephone number. Include any special notes about service hours to aid our audience in using this information; this information should be written in all lower-case in parentheses following the telephone number. "Hours" should be abbreviated to "hrs" without a period, but all other calendar words (i.e., day, week, etc.) should be written out. Examples:

Crisis Line 555-555-5555(24 hrs/day, 7 days/week)
 Toll free 800-555-5555 (24 hrs/day)
 Crisis Line 800-555-5555 [use this format for toll-free crisis lines]

- v) Phone number should be located at the same physical site as the resource in question.
- vi) Do not include the resource in the Go Local system if a phone number can not be identified or verified.

g) Description

- i) The Description should begin with a capital letter, followed by regular case (except for proper nouns), and end with a period.
- ii) Do not use articles (a, an, the, etc.) before Descriptions. For example: "State organization whose mission is to increase public awareness of, and advocacy for physical activity."
- iii) Delete unnecessary spaces between words and/or punctuation.
- iv) Complete sentences and phrases are both permissible; however, make sure the Description "flows" and is easy to read.
- v) Copying text from a website description for a service is permissible as long as promotional language is not included and all other guidelines in this manual are applied.
- vi) Keep site descriptions brief and to the point. This field is limited to 500 characters.
- vii) Watch for acronyms in the Site Name field. You may want to spell out the full name in the Description field, along with an explanation of the resource's function.

- viii) For non-acronym Sites Names, however, *do not* restate the name of the site in the Description field.
- ix) Consider copying and pasting the description into Microsoft Word so you can use the Spelling and Grammar tool to check for errors.

h) Service Area

- i) This field determines how the resource is displayed in response to geographic queries and indicates the area for which the resource provides service(s). Select: zip code, entire area (Georgia), or List of Counties. A provider may not clearly state their intended audience/service area. You may need to make a judgment call based on service type, uniqueness, frequency of need, how the consumer would access the service, etc.
- ii) Zip Code (default choice): Select this when a service is limited to the immediate community where it is located, i.e. a community or neighborhood clinic. This is common with grant funded social programs, clinics, etc.
- iii) Entire Area: Select this when the service is targeted and/or available throughout Georgia, i.e. a statewide service. Does the resource state that its services are available to all Georgia citizens? Is it their mission to serve all citizens in the state/region? Must one drive to the location to use the service? If so, would they use it daily or on occasion? Does it seem reasonable that people all over the state would use this service?
- iv) List of Counties: Select this when services include more than one county. Some resources will declare the counties they serve. If not, you must make a judgment call. Is it reasonably assumed that everyone in the county is eligible/interested in the service? Is the service enough of a "draw" that people in neighboring counties would find the location convenient to them? Consider rural areas - they will commonly drive to larger cities or the nearest small town.
 - (1) If the location of the resource is outside of Georgia, choose the Georgia counties that are served.
 - (2) Click on "Open Counties Window". "GA Counties for Cataloging" window will open.
 - (3) Choose each relevant county from the "All Counties" list. Click "Apply" after each applicable county is highlighted. When all pertinent counties have been selected, close the counties window. The selected counties should be displayed in the "County" field.

i) Display

- i) This selection determines whether the record will display on the “live” Go Local site.
- ii) Select yes or no; the default is set to “no.” If “no” is selected, you must indicate a “Reason(s) not to display.” If necessary, explain reason(s) not to display in the Comments field.

j) Indexing – Local Service Terms and Health Topics

- i) For websites, review several areas of the site to determine how to index the site. This may include looking at any or all of the following site sections: the mission, purpose, about us, services, staff, FAQ. Review any website section that describes the function, purpose, or services.
- ii) As you review the site, think about the terms that might be used to describe it (especially terms the general public might use to search for such a resource). If you are unsure about a term’s definition or scope, refer to the term definitions. (Go to the project website, <http://www.gahealthgolocal.org>, Indexers’ Tools, and click on “Service Term Definitions” (for Local Service Terms) and/or “List of Health Topics.” If you are still not sure which topic(s) to assign, leave a note in the Comments field for a Reviewer.)
- iii) The number of terms that can be assigned to a site is practically unlimited. What may appear as redundancy will actually improve access and retrieval for the user. However, remember that we are providing indexing only to point the user to the resource; we are not indexing every facet of the resource.
- iv) For resources without websites (and therefore without a way to verify services), assign a minimal number of *general* terms. However, if you are able, you should email or call the site to verify services provided and to assist with term assignment. The goal is to minimize “dead ends” for Go Local users. If you email or call to verify information, remember to note the date you email/called in the Comments field.

v) Local Service Terms

- (1) This field holds all subject indexing terms (i.e. controlled vocabulary). In most cases, there are two parts to each indexing element, the Local Service Term and an associated Health Topic. The Local Service Term is made more specific (described or characterized) by linking it with Health Topics. Remember that a resource with a larger website or multiple

services may need to have more than one record created for it. (See Deciding how many records to create for a site, page 32).

- (2) The starting point for indexing the website is selecting the Local Service Term. The selector first identifies the relevant Local Service Term(s) for the resource. This is a decision based on the basic function, or service type, of the resource.
- (3) Assign obvious practitioner Local Service Terms to a resource even if they are not mentioned on a resource's website. For example, if a service calls itself Georgia Oncology, but does not mention that it has oncologists working there, you should still index it to "oncologists." Remember to check for credentials.
- (4) General and Specific Topic Indexing. Go Local follows the principle of indexing to the most specific term available.
- (5) To assign a Local Service Term to a record, click on "Assign Vocabulary" in blue.
- (6) After you select a Local Service Term, the display will change to show you Automatic and Suggested Local Health Topics for the selected Local Service Term. (Note: You cannot map multiple Local Service Terms to Health Topics at once. You must map each Local Service Term individually – one at a time – to related Health Topics.) Once you have selected your Local Service Terms, choose "Apply and Continue to Local Health Topics".

vi) **Local Health Topics**

- (1) The second indexing step is choosing the relevant health topics that can be linked to the Local Service Terms. Local Health Topics are a subset of the MedlinePlus vocabulary. Local Health Topics provide more detail about the focus or activities of the resource. The question the selector is asking at this point in the indexing process is: What health issues does the organization or provider address?
- (2) Examples:
 - (a) If the service is primarily concerned with breast cancer, the health topic chosen should be breast cancer.
 - (b) If the service is for a cancer clinic which mentions treatment of breast, ovarian, lung and prostate cancers, the indexing should use the health topics: breast, ovarian, lung and prostate cancers as well as cancer

(general). Therefore, in such cases, include both specific *and* general terms.

- (c) If a resource is a breast cancer research facility, you would index it as Research Centers – Breast Cancer.
 - (d) If a resource is a cancer care clinic that does not specify which types of cancer it treats, you would index it to Cancer Clinics – Cancer and NOT include any terms for specific types of cancer. This will allow the resource to display to the user under Cancer.
- (3) Some considerations one should make when assigning Local Health Topics include:
- (a) Review the Automatic and Suggested relevant Health Topic groups that are mapped to the given Local Service Term, and choose those topics that apply. However, **do not automatically assign all Automatic and/or Suggested Topics without thinking about their relevancy to the resource at hand.** Often, you will need to browse for additional Local Health Topics that are not listed in either the Automatic or Suggested list.
 - (b) Remember that for resources without websites (and therefore without a way to verify services), assign a minimal number of *general* terms. Also remember that if you are able, email or call a site to verify services provided and to assist with term assignment. Note the date you called/emailed in the Comments field.
 - (c) Do not assume that a resource that is general in nature addresses all the component topics in the group. If the resource says it provides support groups for cancer patients, we cannot assume that it specifically offers services for kidney or bladder cancer.
 - (d) Some resources follow a pattern and can be handled in a similar way. For example, most local health departments, blood banks, and smoking cessation programs, offer the same core services, but even within these types of resources, variations can and do exist. If you are entering or indexing a common type of resource (e.g., a blood bank), it may be helpful to check to see how previous blood bank records, including Approved records from other Go Local projects, were handled. If you look at records from other projects, though, keep in mind that they do not necessarily have the same selection, indexing, or formatting standards as our project.

- (e) Selectors must consider if one or several records are necessary to best represent a resource. (See page 32, Deciding how many records to create for a site).
- (4) Review the Automatic terms and deselect those that do not apply to the resource at hand.
- (5) Next, review and select relevant terms from the "Suggested Terms" list.
- (6) If additional terms are needed beyond or in lieu of Automatic or Suggested terms, click "Browse" to see other available Local Health Topics you can select for this resource.
- (7) Once you have finished selecting Local Service Terms and Health Topics, click on "Close" in blue to collapse the vocabulary window and review your choices.
- (8) If you are unsure about assigning a term, make a note in the Comments field so a Reviewer can address your question.
- (9) When indexing the same resource with 2 virtually identical sites, one in English and the other in Spanish, create a record for the page in English. Send a link for the Spanish version to Rita Smith or Jan LaBeause. These resources may be added at a later date.

vii) **Indexing implied services**

- (1) Websites vary widely in their depth and detail about their services.

Examples:

A Red Cross Chapter that does not say it does health screenings for high blood pressure, but we can tell from the national Red Cross site that all chapters perform several core functions, and blood pressure screenings are among these activities.

An urologist's website that only addresses incontinence, and has no mention of any other condition that an urologist might treat, such as prostate cancer or impotence.

A birthing center, which we know has midwifery services but does not mention them on their pages.

- (2) When a website fails to mention an activity or service that you have good reason to believe they provide – based on personal knowledge, information from other sites, or other resources – index the site to reflect the missing aspects, despite their omission from the site's web pages. If you're unsure about your term assignments, leave a note in the Comments field for a Reviewer.

viii) **Requesting changes to Go Local system vocabulary**

- (1) Occasionally, volunteers may find that a site he/she is trying to index does not match any available Local Service Terms or Health Topics. NLM will try to accommodate local requests if possible, but changes affect all Go Local areas using the NLM-hosted Input System and must be carefully considered. In general, these are the types of changes NLM can change:

- Add a new "See reference" to a local service term
- Add a new Suggested mapping from a Local Service Term to a Local Health Topic
- Change a mapping from Suggested to Automatic or vice versa
- Create a new Health Topic on MedlinePlus if there is a need for health information on a subject

- (2) Note that Georgia Go Local administrators cannot make these changes. All changes to Go Local terminology must be done by NLM.

- (3) All suggestions for vocabulary changes should be sent to the project coordinators, Rita Smith (SMITH_RB@Mercer.edu) or Jan LaBeause (LABEAUSE_J@Mercer.edu).

k) Organization

- i) This field is ONLY used if there is a larger or "parent" organization of a service or resource. To ensure consistent forms of the names chosen for this field, all Organization names must be approved by project administration.
- ii) Open the Organizations window; all the previously approved organization names are listed on the left-hand side of the window. If the name you need is among these, click on it. You cannot create synonyms for an approved name. If you see a form of the name that would make a good synonym, leave a note in the "Comments" field.
- iii) If the organization name you need is not on the list of approved organizations, you may enter it in the 'New unapproved organization name' field for review.

iv) In cases where there is more than one larger or “parent” organization of a service or resource, you may select 2 or 3 organizations.

v) Organization name authority guidelines:

(1) This field will display to the user in parentheses, following the ‘Name of Site’ field. It does not display (is suppressed) if it is exactly the same as the Name of Resource.

(2) General guidelines for choosing organization names for resources *with websites*:

(a) Determine the name of the entity that is the source of the site, publishes, provides, or otherwise is responsible for its content. Do not identify as the Organization the following: contract web development firms, web hosting services, or other agents of the source who do not have responsibility for its content, but merely are making it available on the web.

(b) Be sure to use the name of the organization, not the name of a website, although in some cases they maybe the same.

(c) When looking for the organization responsible for a website, do not create an organization name if sponsorship is financial only.

(d) Pick the full official name as it appears on the site. Do not alter the way it is presented by inverting the order of elements, changing or adding punctuation, symbols, etc. Check the banner at the top of the page, the copyright statement at the bottom of the page, and links to the site’s home or contact information page for guidance on the “official” name. If varying forms of the name are used on the site, you must determine which one is the most complete form of the name. (The other varying forms of the name may be useful as synonyms. Make note of potential synonyms in the Comments field.

(e) Do not try to standardize names of related organizations; accept them as they are given on the site despite variations between similar sites. Examples:

Arc of Cabarrus County; ARC of Haywood County

Piedmont Red Cross; American Red Cross, Triangle Area Chapter

Tar Heels for HEALING

Heal yrself!

FeelGood Wellness Partners

- (f) Include commercial abbreviations such as Inc., Co., Ltd., PA, PLLC, etc.
- (g) However, there are some changes that should be made to organization names:
 - (i) Always capitalize acronyms and omit their internal punctuation (AHEC not A. H. E. C.)
 - (ii) If the site uses a spelled out form of the name and an acronym or abbreviated form, use the spelled out form.
 - (iii) Omit initial articles such as "The."
 - (iv) Spell out Assoc., Univ. and other commonly abbreviated parts of the name.
- (4) Specific guidelines for corporate or government organization names:
 - (a) For all state agencies, use the full department as the Organization - i.e. Georgia Department of Health and Human Services, and Georgia Department of Environmental and Natural Resources.
 - (b) For sites within a university system, use the university's name as the Organization.
 - (c) For hospitals, use the hospital name as Organization.
 - (d) For federal agencies, use the department name as the Organization and preface it with U. S.

k) Comments

- i) This field holds comments about the resource or the indexing and is for use by Indexers, Reviewers, and Local Administrators. It does not display to the public.
- (1) Always enter your comments at the TOP of the Comments field so that it is easy to see the most recent comments. Date is added automatically to your comments. End each note with your initials.

- (2) Create brief notes concerning the site or the record. If a "Reason not to display" a resource is checked, you may explain the reason(s) here. End each note with your initials. The date will AUTOMATICALLY be added to the beginning of your comment after you save, so you do not need to add the date. (And exception is if you call/email to verify information. In that case, please note the date you confirmed the contact information and services in the Comments field.) If you have no comments to add, you do not need to enter your initials in the Comments field.
- (3) It is important to communicate any info to aid the Reviewer in identifying why you made a judgment call. Please make notes in the Comments field as needed. When helpful, include URLs of sources you have consulted in the verification process. This will reduce duplication of effort and help Reviewers see what steps you have taken to research the service.

Cheat sheet:

Do's	Don't's
Check to see if resource is already in system by checking Similar Check button	Don't forget to check to see if service is already in system
Try to think like a potential Go Local user	
Leave off punctuations for credential/degree abbreviations	Don't punctuate credential/degree abbreviations such as LLC, MD, etc. (See list of common credential abbreviations on pages 17-18)
Use "and" (without quotes) for all fields except when indicating an intersection in one of the Address fields	Don't use "&" unless noting an intersection in one of the Address fields
Use ext. for phone # extensions	Don't use Ext. or extension
Enter concise descriptions	Don't enter lengthy, first person narrative (we, our, I), biased, or commercial claims ("best service," etc.); don't include hours or fees
Use most direct URL (if available) to service information (descriptive information, not contact information)	Don't include extensions (index.html, etc.) if the URL works without them
Enter "See website or call for location(s)" (without quotes) in Address1 field when no address provided	Don't enter "see website" (without capital "s") in Address 1 field; don't put a period after this phrase
Remember that Organization is originator of the resource, provider of content, responsible party behind site, etc.	Don't enter as Organization the web service company
Consider what the user will be looking for when they come from the Go Local record to the resource's website (if available). Let this determine which page you will link to.	
Use postal service abbreviations in Address fields. Ex: Ave., Hwy., Ste., Dr.	Don't use "Avenue," "Highway," "Suite," "Drive"
Use "http" in web address	Don't omit "http" in web address
Check format and accuracy of Description field. Delete unnecessary spaces, punctuation, and capitalization.	Don't assume Description field is accurate unless resource has no website with which to verify this field
Use 555-555-5555 as telephone format	Don't use (555) 555-5555 or other format for telephone entries
Separate multiple phone #'s with a semicolon (;)	Don't separate phone #'s with any other punctuation other than a semicolon (;)
Use this format for Crisis or Hotline #'s: Crisis line 555-555-5555; Hot line 555-555-5555	Don't use any other format for Crisis or Hot line #'s
Use this format for Toll free #'s: Toll free 555-555-5555	Don't use any other format for Toll free #'s
Use "Inc." in Site Name field unless "Incorporated" is spelled out on website	Don't spell out "Incorporated" for a site's name unless it is spelled out on the website
For sites with no websites, keep description very general and include only broad index terms unless services can be verified	Don't automatically include all Suggested and/or Automatic Local Health Topics, especially for sites without websites

Deciding how many records to create for a site:

This is a judgment call. Think about the typical Go Local user, and how best to facilitate access for him/her. Consider these concepts:

a) Locations

- i) Create a separate record for each location of the service provider (i.e. multiple office or clinic sites).
- ii) When creating similar records for a service with multiple locations, the records' "Name of site" may be identical. Use a hyphen and add descriptor term(s) to give each record its own distinctive site name. (See page 16, bullet vii under Name of Site.)

b) Parent/child entities

- i) Many of the organizations/programs that we encounter may be a national organization with a state chapter (parent) as well as other local groups (children).
 - (1) Make a record for the "parent" organization; in many cases its service area is the entire state (as it is the parent organization). In most cases, you will use the name of the state chapter for "Name of site." However, it will depend on the relationship of the national organization and state chapter.
 - (2) You may also be able to make separate records for each "child" entity. If the "children" have distinctive contact information, offer unique and specific services, and have websites (if applicable) that meet our selection criteria, create separate records for the "children" sites.

c) Ease of navigation (for resources with websites)

Can the novice user find the desired information from the top-level page?
Consider:

- i) Number of clicks necessary to move to the content on the related pages: will users find this information easily on their own?
- ii) Design aspects of the page: is it complex or hard to navigate? Does it seem likely that users will find the resources described on the related pages?

- iii) Terminology: does the page use technical terms to describe a program or service that the public might not know? Would the user be able to anticipate from the links on the top-level page what is found through these links?
- d) **Distinctiveness of the related pages** (for resources with websites), relative to other related parent or child sites: i.e. is a different (i.e. additional) Local Term or Health Topic necessary to describe the content? Is there a Local Service Term or Health Topic addressed by a subsidiary page that would be hard to find without a separate record?
- e) **Quantity of information**. Is there too much information about a resource for one record? Would it be more useful to users if you divide it into several records?
- f) **Uniqueness of the information** in context with the entire collection of resources: is this the only resource of its type in the region? Has the resource already been entered into the Go Local system (would it be a duplicate)?
- g) **Identity** (for resources with websites). Does the webpage have some sort of information identifying its source? Remember this page will appear to the user out of context to the rest of the site, so it must contain at least a logo, if not contact information for the organization responsible for the content.