

Child Support Program Manual

Progress Notes

Value of the project and use of time

Policies, procedures, and processes that are not clear or agreed upon are being worked out and best practices are being identified in the course of the writing of the manual.

- Example: ASSETS can set an L Group on its own
- Example: Linking of cases
- Example: Use of the 2859 form re cooperation requirements

I think it is safe to say that everyone in the working group is learning things that they didn't know before.

End users out in the districts, too, will learn things from the manual that they didn't know before.

Overall Design

Width of content onscreen

Most help systems of this type have text running the entire width of the monitor. This makes these manuals ugly and very difficult to read.

I designed our online manual so that the body of the content is the same width as a standard 8-1/2" x 11" printed page. This makes it a lot easier to read onscreen, and also serves another function, since this manual must be published both online and on paper.

Keeping the width of content online the same width as in print provides the reader with consistency and stability. The manual looks essentially the same online and in print.

Modularization of content and single-sourcing

The manual is designed so that the end user can quickly and easily find the information they are looking for without being inundated with information that they are not looking for. Therefore, the information is chunked and modularized.

Modularizing the content serves the following purposes:

- We can cleanly update or replace any individual topic. (Minimally invasive)
- Content that appears in multiple places throughout the manual can be kept absolutely consistent, since a single chunk of information can be embedded in multiple places while needing to be edited or updated in one place only.

Print any topic individually

Any given topic can be printed individually. Individual topics should be able to function as standalone chunks of information.

Print the entire chapter (PDF)

Also, each chapter has a link where the end user can download the entire chapter as a single PDF file.

Feedback links on every page

Clicking on the link will launch the end user's email client, with a blank email pre-addressed to the program manual.

Formatting of characters, phrases, and master pages

Character formatting: separate formatting for screen names, codes, etc.

Individual elements such as screen names or codes each have their own formatting. These can be changed globally. For example, if in the future you want all the screen names to be red and italicized, and all the code references to be green, those can be changed globally, and easily.

Process Step pages versus General Information pages

Pages describing individual steps in a process (i.e. drilldown content from the Roadmaps) have a border above and below the header. This makes them easily distinguishable from General Information pages.

The Process Step pages and the General Information pages are built from separate master pages, so that if in the future you want all Process Step pages to have a blue border, or a red header, you can do that, globally and easily.

ADA Compliance

The manual follows best practices for ADA compliance. For example, all graphics have alt text, so that a robotic screen reader (i.e. a text to speech reader) can read them. The same goes for all links to forms and documents, screenshots, etc. They all have alt text so that a robotic text to speech reader or voice-command system can recognize them.

Interface

Front Cover

- The cover has four simple links. (It's uncluttered and actionable.)
- Official OTDA logo, branding, and colors
- Table of Contents in left navigation pane appears by default upon opening the manual, regardless of screen or device used.
- Search box in top right defaults to find topics with ALL (as opposed to ANY) search words. This improves search results.

- Removing inline glossary means a more effective search mechanism because it limits the number of hits.

Index

The index is accessible and searchable in the left navigation pane without the end user having to leave the page that he/she is on.

Glossary

The glossary is accessible and searchable in the left navigation pane without the end user having to leave the page that he/she is on.

Search box

Navigation

Table of Contents is kept to maximum of three levels

Breadcrumbs at the top of every page

“Return to top” button at the bottom of every page

Roadmaps are visual and interactive

All topics are cross-referenced (cross-linked)

“Next” and “previous” page buttons

Supplemental information on demand, in one click

Pop-Up Screenshots

Any time a screen is mentioned, it has a link to a pop-up screenshot.

The screenshots are referenced on the pages, rather than embedded in the pages. Benefit of this? The other day, I updated the screenshot for the CPI-U table screen. I only had to update it in one place, and the change is reflected throughout the manual.

Links to Documents on ERS

Wherever a form or document is mentioned in the text, there is a link to the document itself on ERS. The linked documents open in a separate browser tab, so the end user can see the form or document in question without leaving the page that they are on.