CX KM Team: Author Checklist

Purpose   Use to ensure the following articles meet all requirements prior to publishing:
- New articles
- KM Optimization Project (CHAMPVA)
- Dated articles not previously reviewed

Scope   This document will be used for
- Authoring an article
- Conducting a Peer Review or Final Review

Warning   **DO NOT EDIT THE TABLE OR CELL WIDTH**

Definitions   **ERROR:** Check box if an edit or review is required only

BLOCK NAME / LOCATION: Reviewer will use to provide **Author** with the location of the error.

Leave Notes for Lead Review: If ERROR box is checked, Author must return Checklist to KM Lead for review *upon article completion*.

Checklist

ARTICLE TITLE: Click or tap here to enter text.   **7/1/2020 9:06 AM**

AUTHOR: Click or tap here to enter text.

REVIEWER: Click or tap here to enter text.

KM ARTICLE REQUIREMENTS	ERROR	BLOCK NAME / LOCATION
Template and Source Code (CX KM Migration Guide)		
Appropriate template was used: • Selected article type (KA, JA, SOP) is appropriate for the article's content ☐ • Correct source code was used ☐	☐	

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New template is applied to any dated articles using the CX KM Migration Guide **Note:** Old templates may show: • Major formatting errors • Missing **Review Date** at the bottom • **Additional Information** instead of **More Information** • **Review Date** instead of **Effective Date** • **Responsibility** instead of **Audience** **Instructions:** 1. Access the appropriate HTML template using the following path: CX KM Team\01 KM Templates\HTML 2. Copy the entire HTML code 3. Paste at the bottom of the Source code of the existing article within the KM Author Console Tool 4. Click the Source button to return to the WYSIWYG 5. Copy and paste from old template into the new template within the WYSIWYG	☐	**Reviewer:** If the **ERROR** box is checked, STOP and Return the checklist to the author.
All block names and block content are (top) aligned evenly **Warning: If not, this must be fixed.**	☐	**Reviewer:** If the **ERROR** box is checked, **STOP** and Return the checklist to the Author.
All anchor names (in the block label cells) match the block name		
Maintaining Integrity of Source Doc (Leave Notes For Lead Review)		

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Author has **significantly changed** or **expanded** the process provided by SME or Content Manager without an **authoritative source/source doc:** ○ *Recently* updated and **approved** KM article ○ Undisputable system change (PC Duo > CRM) ○ VA.gov/communitycare ○ **Approved** communication to the floor (i.e., weekly updates, guidance from SLT)	☐	**Reviewer:** If the **ERROR** box is checked, **STOP:** 1. Highlight the content red in eGain 2. Return checklist to the Author requesting **authoritative source/ source doc.** If Author cannot present it **OR** source is not approved, **Reviewer** will notify to KM Lead.
General Tab in the KM Authoring Console		
Article Title is formatted according to the CX KM Style Guide	☐	
Content Type is selected (Required)	☐	
Target Audience is "VA Staff" (Required)	☐	
Following are selected, if appropriate ○ **Process Stage** ☐ ○ **Special benefit group** ☐	☐	
Metadata Tab in the KM Authoring Console		
SEO Summary is added and formatted according to CX KM Style Guide (Required)	☐	
Keywords are added and appropriate	☐	
Related Questions are added and appropriate **Note:** Refer to CX KM Migration Guide	☐	
Links (508 Requirement)		
All links (and anchors) are functional	☐	
All external links open in a new window	☐	
All external links with fully displayed hyperlink have ALT Text (508)	☐	

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All relative links and references to internal KM articles are formatted according to style guide ○ Excludes those dropped into <u>running text</u>	☐	
All internal links are properly formatted and set to Arial 16	☐	
Broken links/place holder links are highlighted "Light Grey" **Warning:** Links are notorious for losing font	☐	
Tables (508 Requirement)		
Tables headers are properly aligned **and** bolded according to style guide	☐	
Table headers are the approved shade of blue (#6699ff)	☐	
All tables have detailed ATL Text description **(508)** formatted according to CX KM Style Guide ☐	☐	
Step/Action tables have both columns set to the correct width (7%,93%)	☐	

Table Properties
   ○ Tables are set to 100% ☐
   ○ Tables are left aligned ☐
   ○ Cell Padding/Spacing set to 1☐
	☐	

All tables have first row header set **(508)**	☐	
Font (CX KM Style Guide)		
All font is set to Arial 16 **Warning:** Links are notorious for losing font	☐	
All field names, menu options, buttons, keys, section titles, etc. are bolded and capitalized according to style guide	☐	

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All emphasized words are accurately capitalized and italicized **OR** bolded according to style guide?	☐	

Dates and Numbers (CX KM Style Guide)		
All phone numbers formatted according to style guide?	☐	
All numbers intended for are enumerated (ex: instead of 1)	☐	
All dates intended for user are short form (ex: 01/20/2020)	☐	
All dates intended for caller are long form (ex: January 20, 2020)	☐	

Miscellaneous (CX KM Style Guide)		
Articles with specific style requirements are also checked against article specific style guide (if, applicable): • CRM Style Guide • VistA Style Guide • Optum Rx Recall		
All bulleted lists and tables are properly structured for consistency (i.e., start with the same part of speech)		
All abbreviations (**Content** tab and **SEO Summary**) formatted according to CX KM Style Guide	☐	
All words are capitalized and formatted according to style guide **Note:** Common errors include: • "drop-down" • "community provider/provider" • "beneficiary" • Veteran • Website/Web page	☐	

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Punctuation is accurate and consistent **Note:** Common errors include: • Oxford comma • Double space after period • Commas and periods placed **outside** of quotation marks	☐	
Standard Template Blocks Are the following blocks formatted according to the **CX KM Style Guide**?		
Overview/Purpose (use this for SEO Summary	☐	
Audience (appropriate name and abbreviation if applicable)	☐	
Additional Information block is changed to **More Information**	☐	

Resources (KA) / **Related Resources (**JA/ SOP) block:
  ○ Proper Spacing ☐
  ○ Proper hierarchy (listing order)☐
  • NO fully displayed URLs
  • Policy Manuals (formatting)☐
	☐	

Reference Block:
  • No links ☐
  • Proper Spacing ☐
  • Proper hierarchy (listing order)☐
	☐	

Pre-Publishing Review		
Final article has been spell-checked **in Word**	☐	

Preview in Portal complete:
  ○ Document appears clean
  ○ Tables, links, bullets, etc. appear properly formatted
	☐	

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Topics		
(WARNING: DO NOT DO THIS FOR NOW) Correct Topic assigned to article using CX KM Migration Guide ?	☐	
Publishing (Author Only)		

Article is published:
  ○ Appropriate note/summary beginning with:
    ○ "Article published" for new articles published for the first time
    ○ "Article updated" for all others
  ○ New/Update box is checked, if appropriate (Required for new articles, process changes, overhauls)
	☐	CX KM Migration Guide

Find and Review Article in Live KM Portal (Author Only)		
Is it in the correct Topic/folder?	☐	
Did all of formatting stick? ○ Tables, bullets, alignment, article template, block alignment, spacing, etc.)	☐	
Are all block names and block content (top) aligned evenly? **Warning: If not, this must be fixed.**	☐	
Additional Review Notes (Leave Notes for Lead Review)		
Article Title clearly and concisely communicates the purpose of the article	☐	
Article is concise (2 - 4 minute rule)	☐	

Article is easy to navigate:
  • Blocks are logically/sequentially ordered
  • Article contains a Quick Access Menu (if necessary)
  • Blocks are appropriately named
	☐	

Article overly details processes that are fully detailed in another article or resource	☐	

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There are additional links/resources the Author *should* add (internal or external)	☐	
Article is free of grammar, spelling, and syntax (sentence structure) errors and typos (Microsoft Word, Grammarly, APA, etc.)	☐	
Article is free of **glaring** process/content errors	☐	