Number

Effective Date   January 19, 2018

Audience   Customer Experience (CX) Knowledge Management (KM) Team

Purpose   This job aid (JA) will identify the procedure for the CX KM Team to format Word documents and eGain KM system articles to comply with applicable provisions of Section 508 of the Rehabilitation Act of 1973.

Document Title   When saving documents, use descriptive name that identifies the document or its purpose.

Headings   If headings are used outside of layout table(s) to organize the document or article, they must be created using formatting or styles inherent to the program, not by formatting text manually. Appendices A-F contain examples of formatted headers.

- **In eGain KMS**, highlight text and use the "Format" button;
- **In MS Word**, highlight text and use "Styles" options in "Home" tab.

NOTE: Formatting of multiple headers on one page or section should follow ascending numerical order. Text font, size, and color CAN be adjusted after using style/formatting options in either program.

Hyperlinks   A. When using links, use unambiguous name that identifies the destination, function, or purpose in the link name or surrounding text. **Important:** Do not use "Click here."

Examples:
- Tele-interpreter Job Aid
- KM Article: Crisis Calls

Lists   If bullets or numbered lists are used, they must be created using list features inherent to the program, not by formatting lists manually. The table below identifies applicable buttons or options based on program being used.

Program	Select/highlight all lines to
be included in list and use:	
• eGain KMS	"Insert/Remove Numbered
List" **or**	
• "Insert/Remove Bulleted List" buttons.	
MS Word	In "Home" tab:
• "Bullets" **or**	
• "Numbering" buttons.	

NOTE: Use "Increase/Decrease Indent" buttons to combine numbering with bullets *in the same formatted list*. Breaking the formatting into sections may be necessary depending on the complexity of the list.

Foreign Languages   When text is in a language other than English, you must identify the foreign language using the methods below.

A. Action for eGain KMS:
- View the source code in the area of the language change and manually mark changes in natural language (if coding did not flow from MS Word when pasting to eGain KMS or if starting in eGain and pasting to MS Word).
- See Appendix A for example of compliant vs. non-compliant code.

B. Action for MS Office Programs:

Step	Action
1	Highlight the non-English text.
2	Select "Review" tab.
3	From the "Language" drop-down menu, select "Set Proofing Language."
4	Select appropriate language for highlighted text.
5	Check or uncheck "Do not check spelling or grammar" as desired.
6	Click "OK."

Images/ Objects Formatting   To make images compliant, complete the following steps. See Appendix B for guidance on proper use of alternative text.

NOTE: The description text for images of text that deliver information need not be

Font Color

The following font colors are Section 508-compliant when used against a white background or in table headers filled/colored blue per KM Style Guide. Fill and font colors not designated in this chart must be tested for compliance prior to use in published articles/documents. To test for compliance, visit https://www.levelaccess.com/color-contrast-checker/.

	eGain (KMS)		MS Word
	RGB (17, 17, 17)	Black; #111111; RGB (0,0,0)	Black; #000000;
	RGB (178, 34, 34)	Fire Brick; #B22222; RGB (192, 0, 0)	Dark Red; #c00000;
	RGB (17, 17, 255)	Blue; #1111ff; RGB 0, 0, 255	Blue; #0000FF;
	RGB 197, 214, 232	#c5d6e8	Ice Blue; Blue, Accent 1, Lighter 60%; #b8cce4 RGB 184, 204, 228
	RGB (102, 153, 255)	#6699FF RGB (102, 153, 255)	Light Blue

Note: Font color alone **cannot** be used to designate special meaning or actions. Always use an asterisk (*) or other special character to convey meaning within the surrounding text.

Font Size and Type

Use font size and type designated in the CX KM Style Guide.

- For MS Word documents: 11 point text is the minimum acceptable size for normal size, 14 point for large print. Recommended size is 16 point.

- Text type should be non-serif/sans-serif fonts such as Arial, Tahoma, Calibri, etc.

Repeated Blank Characters

Extra spaces, excessive tabs, and empty paragraphs should be avoided so screen readers do not erroneously indicate the end of the document or information.

- Delete/remove any repeated blank characters reported by Accessibility Checker or found by using Show/Hide button in the "Paragraph" section of the "Home" tab of MS Word.

Data Table Formatting Procedure

To make simple data tables compliant, complete the following steps.

Important:
- Nested tables (table within a table) are never compliant.
- Data tables must be formatted in/created by the program's built-in features (not an image/jpeg/gif/etc.).
- Data tables should not contain any blank/empty rows or columns.
- Complex tables require modifying source code (rather than just Table Properties) to associate rows/cells with headers. See Appendix C for guidance.
- Simple data tables can have merged cells under most circumstances but should be avoided wherever possible for ease of reading/navigation. See Appendix D for examples.
- These formatting requirements do not apply to layout tables used to organize content within the document or article. See Appendix D for examples.

A. eGain KMS Procedure:

Step	Action
1	As you hover over the table, right click.
2	Select "Table Properties."
3	From the "Headers" drop-down menu, choose "First Row."

Important: The default selection "None" is non-compliant. "First Column" or "Both" are not available in Microsoft programs and should therefore not be used in e-Gain (KMS).

4	Leave the "Caption" blank.

Important: If entered, a caption will appear in the article above the table.

5	Create and insert appropriate text in the "Summary" field in the format "This table provides…"

Examples:
- This table provides steps to…
- This table provides if/then conditions to…
- This table provides guidance for …

NOTE: Summaries may be created by editing the table's stem sentence. See Appendix E for example stem sentences and summaries.

6	Click "OK."
7	Repeat steps as needed for each table within the KM article.

Note: If you are experiencing issues editing the table, proceed as follows:
1. Remove the headers applied in Step 3 (i.e., select "none").
2. Click "OK."
3. Complete your edits.
4. Reapply the headers using Step 3.

Verifying & Noting Compliance	• Use relevant <u>508 checklists</u> to verify any/all applicable accessibility issues were addressed.
	
	• In MS Office programs use Accessibility Checker to ensure document is compliant. **Important:** Authors MUST review & correct all Errors and SHOULD correct any Warnings.
	
	    ○ "Inspection Results" will display in a window on the right of the document.
	    ○ Click on each listed Error or Warning to locate and repair any issues.
	    ○ "Additional Information" at the bottom of the window provides reason why fix is required or recommended, as well as ways to fix the reported issue.
	
	• To annotate article/document compliance: Add a diamond shape (♦) in front of the "Reviewed" date once all aspects of the article are 508 compliant. (
	    ○ For SharePoint PDFs: Place the diamond shape in front of the date listed in the footer.
	    ○ For eGain KMS Job Aids: Place the diamond shape in front of the Effective Date.
	    See <u>Appendix F</u> for screen shots of each program's selection windows.
	
	    A. **In eGain KMS**:
	        ○ Alt+4 (from the 10-key pad) **OR**
	        ○ "Content" tab, "Special Character" (Ω) button
	
	    B. **In Word/Excel**:
	        ○ Alt+4 (from the 10-key pad) **OR**
	        ○ "Insert" tab, "Symbol" (Ω) button, Font: Arial, Subset: Miscellaneous Symbols

Show/Hide	There are no restrictions or rules for show/hide (eGain KMS) or expand/collapse (Word).
Questions	Questions, comments, and/or recommendations regarding this job aid should be forwarded to your immediate supervisor.
Resources	<u>Section 508 Office Home</u> <u>Associating Headers in Complex Tables - AMP</u> <u>Coding Foreign Languages – AMP</u> <u>Color Contrast Checker</u>

<u>Appendix A:</u>
Sample Coding for Foreign Languages

Properly marking changes in natural language will allow users to render languages appropriately across all technologies. Highlighted areas indicate additions to code necessary for compliance in eGain KMS.

Compliant Code:
<p>And with a certain je ne sais quoi,
she entered both the room, and his life, forever. <q>My name
is Natasha,</q> she said. <q lang="it">Piacere,</q>
he replied in impeccable Italian, locking the door.
</p>

Non-Compliant Code:
<p>And with a certain je ne sais quoi,
she entered both the room, and his life, forever. My name
is Natasha, she said. Piacere,
he replied in impeccable Italian, locking the door.
</p>

RETURN

Appendix B:
Images/ Objects

- All images and objects that convey meaning must provide alternative text (alt text). The author determines the purpose for the use of the image.
  - The goal of alt text should be to present text which will provide the same level of understanding to those who cannot see the image as it does to those who can and without cluttering the page with meaningless text.
  - General rule is to limit the number of characters for alternate text to less than 120.
  - For descriptions that are longer than appropriate for alternate text, the description should be placed in surrounding text, a footnote, or an appendix.

- Alt text for informative images should convey the concept or information rather than a literal description of the image. (EX: "Telephone" vs. "Image of telephone receiver".)

- The following types of images should contain an empty/null alt text value. **NOTE:** The Accessibility Checker may report these as an "Error" but according to available resources, this is a compliant practice for Web pages. Online tutorials can help authors determine compliance in these situations.
  - To apply an empty/null alt text value to the image: In the description field of the Alt Text dialog box press the space bar once followed by a carriage return/ "Enter."
    - Images that are for decoration such as separation lines, borders, spacers, or list bullets;
      - Use symbols instead of images whenever possible to avoid negatively impacting the accessibility of a page.
    - Images used for ambiance (clip art or "eye-candy");
    - Decorative images as part of text links; or
    - Images identified and described by surrounding text.

- Functional images used for buttons, links or other interactive elements should contain alt text that conveys the purpose of the image or action that will be initiated instead of description of image.

- Images that contain text must also provide alternative text.
  - The descriptive text for images of text that deliver information must match the text in the image verbatim.
  - Text should be used instead of images of text whenever possible unless it is essential or unavoidable.
  - Logotypes (text that is part of a logo or brand name) are considered essential and thus can remain images. **NOTE:** There is no need to add the word "logo" to the descriptive texts for logotypes.

- Images that are complex or require extensive description (including screen shots of forms or systems/programs, charts and graphs, diagrams and illustrations, maps, etc.) should provide sufficient description outside of the alt text field along with alt text value.
  - Objects and shapes can be used to create focus on or highlight certain areas of images, or to pixelate/hide sensitive information, but these objects must also be compliant along with the base image. Adding alternative text to objects and shapes would clutter the page with meaningless text. Therefore, best practice is to build the image in a separate file (Word, Publisher, etc.), take a screen shot of the entire completed image, and paste

this new image into the document or article. Examples in this document are images built in this manner.

- [Groups of images](#) used to convey a single piece of information require alternative text in the first image only. All other images in the group would have empty/null alt text values.

- Image maps (such as diagrams, flow charts, organizational charts, etc.) that allow user [interaction](#) in multiple areas require alt text for the composite image/object as well as each active area/link within the mapped image.
    - Non-interactive image maps would follow guidelines for complex images.

Examples of Compliant Images:
Hover over links and images to view any screen tips, or right-click on images & select "Format Picture" then "Alt Text" to view descriptive text for the examples contained in the following pages.

Informative Images:

0123 456 7890   0123 456 7891

Decorative Images:

          Always be sure to use your 508 checklists.

Crocus bulbs

The sleeping dog: Let sleeping dogs lie is a proverb that means "don't initiate trouble. If something that could be troublesome is quiet, then leave it alone".

Functional Images:

 MyHealtheVet Home   MyHealtheVet Home

Images of Text:

Images of Text Using Caption:

Help for homeless Veterans can be found at
877-4AID-VET (877-424-3838)
and va.gov/homeless.

Complex Images:

Screen Shot 2

View Registration (VR) screen 1 is used to determine if the address has a bad address flag. The bad address indicator is the last field in Section <4>, located in the left column on the screen.

Screen Shot 3

[Image Description](#)*

*In the actual document or article this link should take the reader to a description of the image-usually a bookmark in the same document where the article explains contents of the image. In this example (Job Aid: Bad Address Indicator Contact Management), a link back to Procedure block, Step 5 would likely suffice. **NOTE:** The link above takes users to that Job Aid, but not to the bookmark added to Step 5.

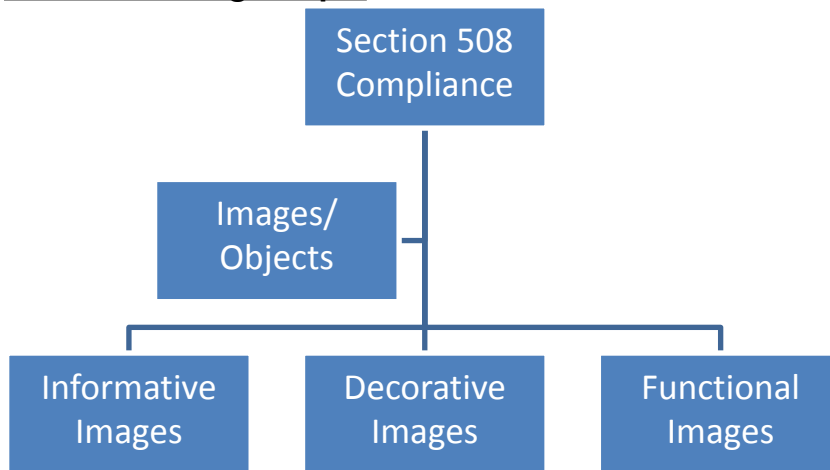Alternatives to linking to bookmarks within documents:
1. Link to an appendix containing detailed description of image(s).
2. Link to external document or site containing detailed description of image(s).

NOTE: See [Web Accessibility Tutorials](#) for example of long description of chart data that includes overview, chart values, and description of presentation of data.

Groups of Images:
Rating: ★★★⯪☆

Interactive Image Maps:

```
        ┌──────────────────┐
        │   Section 508    │
        │   Compliance     │
        └────────┬─────────┘
   ┌──────────────┐
   │   Images/     │
   │   Objects     │
   └──────────────┘
   ┌────────┬──────────┬──────────┐
┌───────────┐ ┌────────────┐ ┌───────────┐
│ Informative│ │ Decorative │ │ Functional│
│   Images   │ │   Images   │ │   Images  │
└───────────┘ └────────────┘ └───────────┘
```
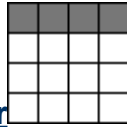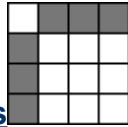
[RETURN](#)

<u>**Appendix C:**</u>
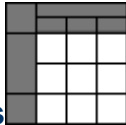Complex Tables: Compliant vs. Non-Compliant

Complex tables require modifying source code (rather than just Table Properties). To determine the appropriate use of "First Row," "First Column," or "Both" as headers and required modifications to code, authors should refer to online tutorials for these table concepts:
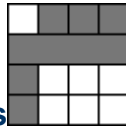
- **Tables with one header** for rows or columns: For tables with content that is easy to distinguish, mark up header cells with <th> and data cells with <td> elements.

- **Tables with two headers** have a simple row header and a simple column header: For tables with unclear header directions, define the direction of each header by setting the scope attribute to col or row.

- **Tables with irregular headers** have header cells that span multiple columns and/or rows: For these tables, define column and row groups and set the range of the header cells using the colgroup and rowgroup values of the scope attribute.

- **Tables with multi-level headers** have multiple header cells associated per data cell: For tables that are so complex that header cells can't be associated in a strictly horizontal or vertical way, use id and headers attributes to associate header and data cells explicitly.

- **Caption & Summary**: A caption identifies the overall topic of a table and is useful in most situations. A summary provides orientation or navigation hints in complex tables.

Compliant Complex Table - Examples #1a & b

	Winter		Summer	
	Morning	**Afternoon**	**Morning**	**Afternoon**
Denver	9	36	55	95
Washington	20	40	70	92

Non-compliant Complex Table Example

	Winter	Summer

	Morning	Afternoon	Morning	Afternoon
Denver	9	36	55	95
Washington	20	40	70	92

Highlighted areas in the source code below indicate additions/changes to code necessary for compliance.

Coding for Compliant Example #1a using scope attributes (recommended method):

```
<table>
tr>
 <td></td>
<th colspan="2" scope="colgroup" >Winter</th>
 <th colspan="2" scope="colgroup" >Summer</th>
</tr>
<tr>
 <td></td>
 <th scope="col" >Morning</th>
 <th scope="col" >Afternoon</th>
 <th scope="col" >Morning</th>
 <th scope="col" >Afternoon</th>
</tr>
<tr>
 <th scope="row" >Denver</td>
 <td>9</td>
 <td>36</td>
 <td>55</td>
 <td>95</td>
</tr>
<tr>
 <th scope="row" >Washington</td>
 <td>20</td>
 <td>40</td>
 <td>70</td>
 <td>92</td>
</tr>
</table>
```

Coding for Compliant Example #1b using the id and headers method:

```
<table>
<tr>
 <td></d>
 <th colspan="2" id="winter" >Winter</th>
 <th colspan="2" id="summer" >Summer</th>
</tr>
<tr>
 <td></td>
 <th id="am1" >Morning</th>
```

```
  <th id="pm1" >Afternoon</th>
  <th id="am2" >Morning</th>
  <th id="pm2" >Afternoon</th>
</tr>
<tr>
  <th id="denver" >Denver</td>
  <td headers="denver am1 winter" >9</td>
  <td headers="denver pm1 winter" >36</td>
  <td headers="denver am2 summer" >55</td>
  <td headers="denver pm2 summer" >95</td>
</tr>
<tr>
  <th id="Washington" >Washington</td>
  <td headers="washington am1 winter" >20</td>
  <td headers="washington pm1 winter" >40</td>
  <td headers="washington am2 summer" >70</td>
  <td headers="washington pm2 summer" >92</td>
</tr>
</table>
```

Coding for Non-Compliant Example:
```
<table>
<tr>
  <td></td>
  <th colspan="2">Winter</th>
  <th colspan="2">Summer</th>
</tr>
<tr>
  <td></td>
  <th>Morning</th>
  <th>Afternoon</th>
  <th>Morning</th>
  <th>Afternoon</th>
</tr>
<tr>
  <td>Denver</td>
  <td>9</td>
  <td>36</td>
  <td>55</td>
  <td>95</td>
</tr>
<tr>
  <td>Washington</td>
  <td>20</td>
  <td>40</td>
  <td>70</td>
  <td>92</td>
</tr>
</table>
```

PCC CRM Documentation Table Example (from eGain KMS):

CRM Documentation	
Area	**PRM Referral Template**
Nursing Home Assist	PCC Wrong Patient
Privacy Violation	PCC Wrong Patient

<table border="1" bordercolor="#003f75" cellpadding="5" cellspacing="1" ==summary="This table provides PCC Contact Reps with guidance on documenting CRM."== width="100%">
                                                        <thead>
<tr bgcolor="#c5d6e8">
==<th colspan="2" scope="colgroup">==
<p align="center">CRM Documentation</p>
</th>
</tr>
</thead>
<tbody>
<tr bgcolor="#c5d6e8">
==<th scope="col">==Area</th>
==<th scope="col">==PRM Referral Template</th>
</tr>
<tr>

RETURN

Samples of compliant: simple data tables, simple data tables with merged cells, and layout tables.

Samples of Simple Data Tables (First Row headers):

CRM Documentation	Health Benefits Contact Rep Requirement	
Type	HB	
Area	365 Pending	
Sub Area	Leave blank unless you receive notification Veteran is deceased. **NOTE:** Use Deceased Vet for notification.	
Contact	Required **NOTE:** Do not create a contact with 0000s for the Social Security Number (SSN). NOTE Veteran's first and last name in Summary if caller does not have enough information to query for a contact in Master Veteran Index (MVI).	
Resolution	Use appropriate Resolution	
Status	Closed	

Outpatient Services, Description, & Copayment		
Basic Care Services	Services provided by a primary care clinician	$15/visit

Specialty Care Services	Services provided by a clinical specialist such as:
	• Audiologist
	• Cardiologist
	• Optometrist
	• Surgeon
	• Radiologist
	• Specialty tests
	   ○ Magnetic resonance imagery (MRI)
	   ○ Computerized axial tomography (CAT) scan
	   ○ Nuclear medicine studies
		$50/visit

Outpatient Services, Description, & Copayment		

Copayment Exempt Services	There is no copayment requirement for:
	• Electrocardiograms
	• Flat film radiology services
	• Hospice care
	• Laboratory services
	• Managing Obesity for Veterans Everywhere (MOVE) (individual and group)
	• Publicly announced Department of Veterans Affairs (VA) public health initiatives (e.g., health fairs)
	• Smoking cessation counseling (individual and group)
	• Outpatient visit consisting solely of immunizations or preventive screenings
	   o Alcohol or Tobacco use
	   o Breast cancer
	   o Cervical cancer
	   o Colorectal cancer by fecal occult blood testing
	   o Education about the risks and benefits of prostate cancer screening
	   o Hepatitis C screening and/or testing
	   o Human Immunodeficiency Virus (HIV) testing
	   o Hyperlipidemia screening
	   o Hypertension
	   o Influenza immunization
	   o Pneumococcal immunization
		$0/visit

Inpatient Copayment & Per Diem Charges	
First 90 days of care during a 365-day period	$1,340
Each additional 90 days of care during a 365-day period	$670
Per Diem Charge	$10 a day

Long Term Care Services	
Institutional: • Nursing Home Care • Geriatric Evaluation • Respite Care	Maximum of $97 per day
Non-Institutional: • Adult Day Health Care • Geriatric Evaluation • Respite Care	Maximum of $15 per day
Institutional Domiciliary Care	Maximum of $5 per day

Samples of Compliant Tables with Merged Cells:

Year	Medical Care Copayment Threshold	Medication Copayment Threshold (VA Base Pension Rate)
2017	Veterans with no dependents $32,074 and $38,489 with one dependent	$12,907 with no dependents and $16,902 with one dependent
	Add $2,205 for each additional dependent	Add $2,205 for each additional dependent
2008-2016	Previous Means Test Thresholds	

If the Veteran...	Then the minimum active duty service requirement...
Enlisted in the Armed Forces on or before September 7, 1980	Does not apply and one day of active duty is sufficient.
Served as an Officer on active duty on or before October 16, 1981	
Enlisted in the Armed Forces for his/her first term of active duty after September 7, 1980	Applies and he/she must complete at least 24 months of continuous active duty service or meet one of the exceptions.
Originally signed up under a delayed entry program on or before September 7, 1980, and subsequently entered active duty after that date	
Entered active duty after October 16, 1981 (officer or enlisted)	
Is a: • [Reservist or National Guard member](#) and was activated under 10 U.S.C. 12301 (commonly referred to as Title 10) • Navy Veteran in the Reserve Component as a Training and Administration of the Reserve (TAR) • Veteran in the Reserve Component as a Full Time Support (FTS)	

Samples of Compliant Layout Tables:

[Member Identification (ID)](#)	[Safeguard/Destroy VIC](#)
[Member ID Not Displayed on VHIC](#)	[VHIC Not Working in Kiosk](#)
[Plan ID](#)	[VHIC Remedy Ticket](#)
[VHIC Barcode and Magnetic Strip](#)	[Resources](#)
[More Than One Branch of Service](#)	[Reference](#)
[When to Expect VHIC After Picture Taken](#)	

<div style="background:#1a1a4e; color:white; text-align:center; font-weight:bold;">Member Services Enrollment and Eligibility Articles</div>

Enrollment and Eligibility Articles   **Related Articles**

► Applying for VA Health Care by Telephone   ► Minimum Active Duty Service
Requirement

- ► Veteran Eligibility for Health Care
- ► National Guard and Reserve Veteran Benefits
- ► Enrollment Priority Groups
- ► Income Verification Match
- ► Income-Expenses for Means Testing Purposes
- ► Preferred Facility
- ► Access to and Requests for VA Medical Records
- ► General Discharge Information
- ► Record Change (Address or Contact Information)
- ► Purple Heart Recipient
- ► Request for Military Records
- ► Personal Representative
- ► Copayment Exemptions

[RETURN](#)

<u>Appendix E:</u>
Stem Sentence and Table Summaries

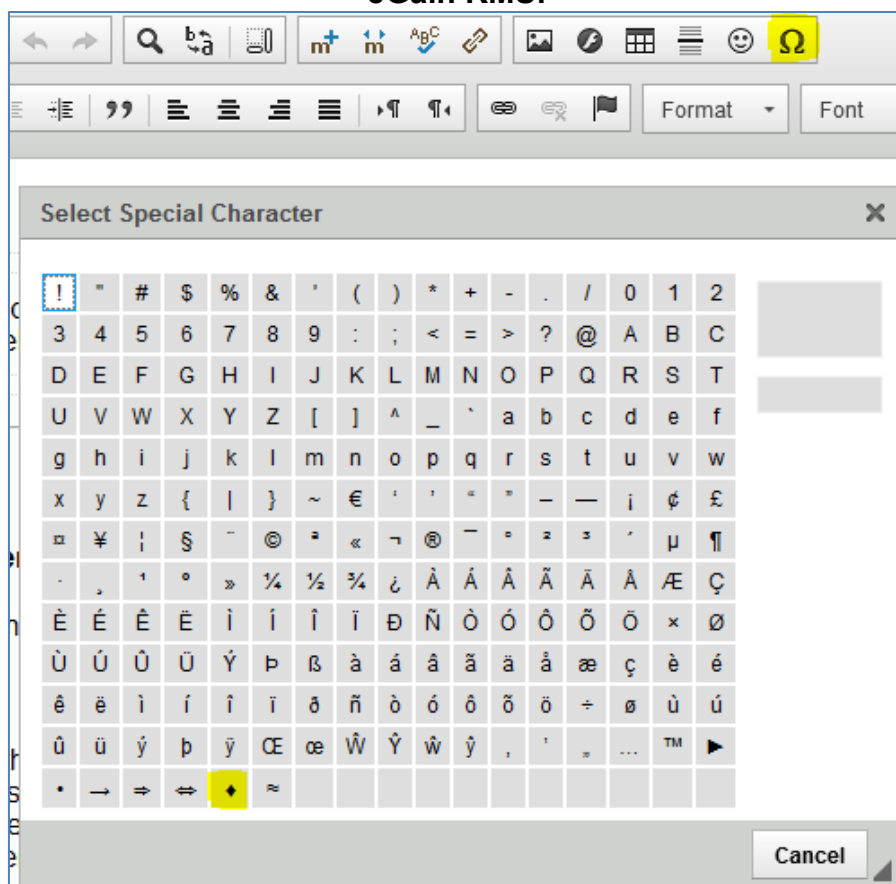See the table below for example stem sentences and corresponding summaries.

- General rule is to limit the number of characters for descriptive text to less than 120.

- Acronyms spelled out in the stem sentence can be abbreviated in the descriptive text.

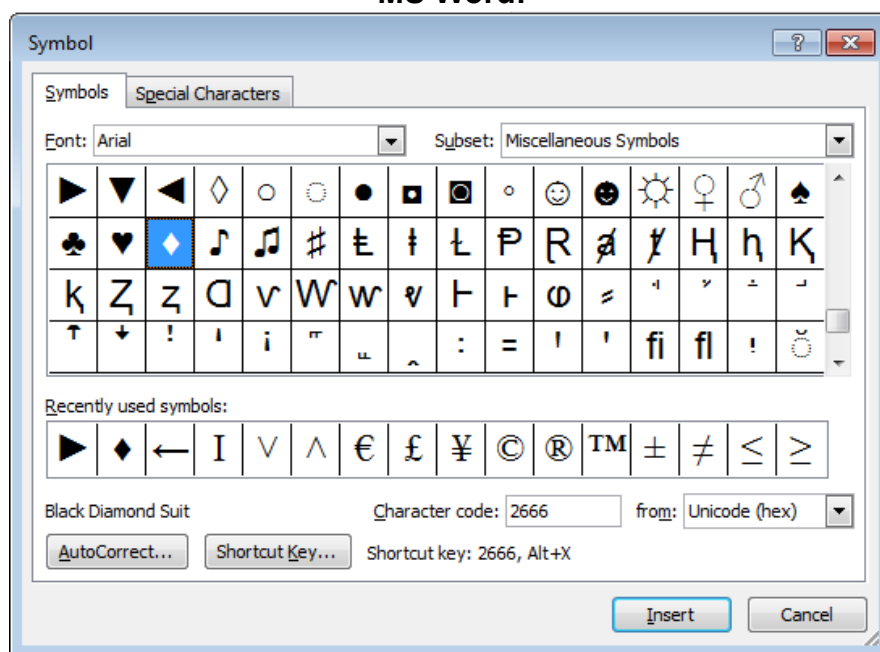| Stem Sentence Examples	Table Summary Examples
First Party Contact Representatives will complete the following steps to edit the Veteran's patient data.	This table provides steps for First Party Contact Representatives to edit the Veteran's patient data.
After completing VistA Enrollment Procedure, complete the following steps in Enrollment System (ES).	This table provides steps to unlock a Veteran's record using the ES after completing VistA Enrollment Procedure.
Review the Veteran's account, and then consult the following table.	This table provides if/then conditions to determine if a Veteran should be billed after the Veteran's account was reviewed.
Consult the below table to determine appropriate CRM sub-area for inbound/ outbound call.	This table provides guidance for choosing the appropriate CRM sub-area to document an inbound/outbound call.

RETURN

Appendix F:
Special Characters/Symbols Selection Windows

eGain KMS:

MS Word:

[RETURN]