|  |  |  |
| --- | --- | --- |
| **Customer Experience (CX)** | Knowledge Management Style Guide | |
| This style guide establishes consistent style guidelines for the CX KM Team. | | November 2019 |

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# Introduction

Knowledge Management (KM) is the systematic means of capturing, organizing, retrieving, sharing, and generating knowledge. KM is, in other words, the ability to access what we know when we need to know it. Tapping into knowledge “on-demand” allows us to avoid “reinventing the wheel” and increases our ability to be innovative and creative in how we perform our business functions.

# Responsibility

Cx KM staff is responsible for implementing the procedures and tools required to easily find and share knowledge and information that supports proactive and responsive decision-making at all levels.

# KM Style Guide

## Typography

### **Font :** The primary typeface for the Knowledge Management System (KMS) is Arial.

### **Font Size:** The primary font size for the Knowledge Management System (KMS) is size 16.

### **Emphasis**

#### Quotation Marks “Quotes”

* Do not use quotes for emphasis
* Do not put quotation marks around titles
* Do not use quotation marks for common nicknames, technical terms that readers are likely to know
  + **Important:** This includes CRM Task Names and Subjects, which must be formatted exactly as they appear in CRM.
* Do use quotes for…
  + Directly quoted material and words of dialogue
  + Referring to document status (e.g., “In-Review”; “Pending”) found in:
    - Stellent
    - DMD screen of VistA-ICQ
* A detailed list of when and when not to use quotes is located in the [APA Style Guide](https://apastyle.apa.org/style-grammar-guidelines/italics-quotations/quotation-marks)

#### *Italics*

* Avoid using italics for emphasis. Instead, rewrite your sentence to provide emphasis:
  + Place important words or phrases at the beginning or end of a sentence instead of in the middle
  + Break long sentences into several shorter sentences.
  + There is no need to italicize a single word at the beginning of the sentence *for emphasis*:
    - Example: Is the document available?
      * *Yes:*
      * *No:*
* However, *do* use italics if emphasis might otherwise be lost or the material might be misread
  + Example: Annual Leave must be *enterred* before December 31, 2019 and *used* before January 15, 2020.
* A detailed list of when and when not to use italics is located in the [APA Style Guide](https://apastyle.apa.org/style-grammar-guidelines/italics-quotations/italics#italics-for-emphasis).

#### **Bold**

Use bold within articles sparingly – our preference is not to use bold unless the customer specifically requests stronger/special emphasis.

Do not…” statements at the beginning of a sentence will no longer appear in bold unless requested by the Business Unit.

* KM style is to use bold letters for block labels and table column headers.
* The following must also be **bold** for consistency:
  + All **Notes:** and **Important:** tags must be bold:
    - **Note:** Allow 90 days for processing.
    - **Important:** Do not shut down your computer.
  + Names of the following: (for examples, refer to this resource by [IBM](https://www.ibm.com/support/knowledgecenter/en/SSKTWP_9.0.1/wid_create_widget_web_t.html))
    - Fields
    - Icons
    - Buttons
    - Keys (capitalize the first letter)
    - Sections of a system, columns, etc.
    - Menu options
  + Specific blocks in other KM articles
    - Example: For more information**,** refer to the **Individuals Authorized to Request Updates** section of the Beneficiary Record Update Requests - SOP.

Table 1. Table of regular letters in Arial font

Arial Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ

abcdefghijklmnopqrstuvwxyz

1234567890 (~!@#$%^&\*}

Table 2. Table of bolded letters in Arial font

**ABCDEFGHIJKLMNOPQRSTUVWXYZ**

**abcdefghijklmnopqrstuvwxyz**

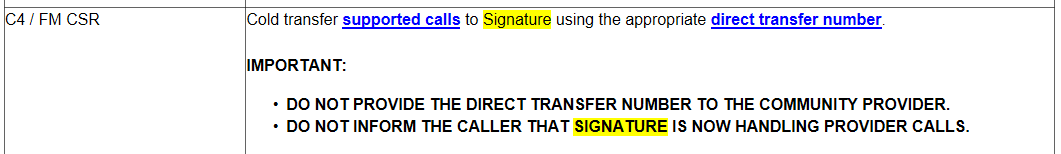
**1234567890 (~!@#$%^&\*}**

**Arial Bold**

#### Underline, ALL CAPS

* Do not underline, with the exception of hyperlinks.
* Do not highlight in published articles.
  + **Exception:** Broken links and place holders for links to related articles that are pending publishing may be highlighted light grey.
* Do not use ALL CAPS unless specifically requested for special emphasis for a limited amount of text, or as needed to display acronyms, names, etc., that use all caps.

Example of ALL CAPS requested for emphasis:



## Acronyms and Abbreviations

Generally, it’s fine to use acronyms and abbreviations if you feel they’re commonly recognized or if it helps avoid repetition.

* Always spell out the full name, title, or phrase the first time you refer to it in text, followed immediately by the acronym/abbreviation in parentheses.
  + **Example:** Posttraumatic Stress Disorder (PTSD)
* Use the acronym/abbreviation for **each and every** subsequent use.
* It is **not** necessary to note the acronym in parentheses if there is only one reference.
* Use brackets in instead of nested or back-to-back parentheses.
  + **Incorrect:** (i.e., Posttraumatic Stress Disorder (PTSD))
  + **Incorrect:** (i.e., Posttraumatic Stress Disorder)(PTSD)
  + **Correct:** (i.e., Posttraumatic Stress Disorder [PTSD])

For more information on formatting, parentheses/brackets, or abbreviations within parentheses, refer to the [APA Style Guide](https://apastyle.apa.org/style-grammar-guidelines/abbreviations/definition).

Table 3. Table of commonly used acronyms

|  |  |  |
| --- | --- | --- |
| Name | Abbreviation | Authoritative Source |
| American Federation of Government Employees | AFGE | [AFGE website](https://www.afge.org/about-us/afge-at-a-glance/) |
| Character of Discharge | COD |  |
| Clinical Pharmacy Resources | CPR |  |
| Compensation & Pension | C&P |  |
| Compensation and Pension Record Interchange | CAPRI |  |
| Computer Patient Record System | CPRS |  |
| Consolidated Copayment Processing Center | CCPC |  |
| Consolidated Mail Outpatient Pharmacy | CMOP |  |
| Consolidated Patient Account Center Veteran Services | CPAC Veteran Services |  |
| Customer Relationship Management | CRM |  |
| Date of Birth | DOB |  |
| Date of Death | DOD |  |
| Department of Defense | DoD |  |
| Department of Program Integrity (Program Integrity) | DPI |  |
| Diagnosis-Related Group | DRG |  |
| Department of Veterans Affairs | VA | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Enrollment System | ES |  |
| Future Date of Discharge | FDD |  |
| Health Eligibility Center | HEC |  |
| Health Insurance Portability and Accountability Act | HIPAA |  |
| Health Resource Center | HRC |  |
| Home-Based Primary Care | HBPC |  |
| instant message | IM |  |
| Knowledge Management System | KMS |  |
| Master Patient Index | MPI |  |
| Long-Term Care | LTC |  |
| Master Veteran Index | MVI |  |
| My Health***e***Vet | MHV |  |
| National Cemetery Administration | NCA | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| National Drug Code | NDC |  |
| Next of Kin | NOK |  |
| Notice of Disagreement | NOD |  |
| non-service-connected | NSC |  |
| Office of Inspector General | OIG |  |
| Office of General Counsel | OGC |  |
| Partner Relationship Management | PRM |  |
| Personal Identity Verification | PIV |  |
| Personally Identifiable Information | PII |  |
| Protected Health Information | PHI |  |
| Point of Contact | POC |  |
| Post Office Box | PO Box |  |
| Post-Traumatic Stress Disorder | PTSD |  |
| Public Key Infrastructure | PKI |  |

### Acronyms - continued

Table 3 - Continued. Table of commonly used acronyms

|  |  |  |
| --- | --- | --- |
| Name | Abbreviation | Authoritative Source |
| Sensitive Personal Information | SPI |  |
| service-connected | SC |  |
| Social Security Number | SSN |  |
| VAMC Staff Enrollment and Eligibility | VAMC Enroll\_Elig |  |
| Veteran Information Solution | VIS |  |
| Veterans Benefits Administration | VBA | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Veterans Health Administration | VHA |  |
| Veterans Health Information Systems and Technology Architecture | VistA |  |
| Veterans Integrated Service Network | VISN | [VHA Locations web page](https://www.va.gov/directory/guide/division.asp?dnum=1) |
| Veterans Service Organizations | VSO |  |
| Welcome to ChooseVA (no need to spell out “Department of Veterans Affairs” at first use in this context) | W2ChooseVA |  |
| Zone Improvement Plan code | Zip code (no need to spell out at first use) |  |

### Abbreviations

See the following table for agreed-upon abbreviations:

Table 4. Table of commonly used abbreviations

|  |  |  |
| --- | --- | --- |
| **Word** | **Abbreviation** | Authoritative Source |
| continued | cont. (Source: MLA 6th)  **Note*:*** For BP/SOP/JA tables, may be spelled out if it doesn’t take up additional space and displayed in parenthesis (Continued) or abbreviated in parenthesis (Cont.). Use lightface type (not bold). |  |
| e.g. | Abbreviation for the Latin *exempli gratia* – for example.  Used to introduce one or more examples that illustrate something stated.  Do not spell out on first use.  Do not use with etc.  To create a separate clause, use e.g. followed by a comma within parentheses:  **Example:** Sweets (e.g., pie, cake, chocolate) are not healthy snacks. |  |
| etc. | Do not spell out on first use (abbreviation for et cetera).  Do not use with e.g. or i.e. |  |
| i.e. | Abbreviation for the Latin *id est* – that is.  Used to introduce a rewording or clarification of a statement that has just been made or of a word that has just been used.  Do not use with “etc.” (**Note:** If you are trying to use it with etc., you probably need to either drop the i.e. and use etc., or switch to e.g. and drop etc.)  To create a separate clause, use i.e. followed by a comma within parentheses:  **Example:** Ducks are birds (i.e., warm-blooded vertebrates distinguished by having the body more or less completely covered with feathers and the forelimbs modified as wings). |  |
| Microsoft | Do not abbreviate (“MS” is commonly used to stand for Member Services) |  |
| United States Postal Service (USPS) “street” abbreviations (road/RD, street/ST, etc.) | Use the following resource: <http://pe.usps.gov/text/pub28/28apc_002.htm?q=Postal+Service+standard+abbreviations&t=H&s=R&p=1&c=Pub28> | USPS |
| USPS “unit” abbreviations (apartment/APT, suite/STE, etc.) | Use the following resource: <http://pe.usps.gov/text/pub28/28c2_003.htm> | USPS |
| United States | US (Source: MLA 6th) |  |
| versus | vs. (GPO style guide; *however,* MLA 6th gives v. as used in legal documents) |  |

# VA Mission Statement

Use of the VA Mission statement:

|  |
| --- |
| VA’s mission statement may not be paraphrased or altered on official VA documents or in external or internal presentations. |
| Use President Abraham Lincoln’s direct quote from his 1865 second inaugural address verbatim: “To care for him who shall have borne the battle and for his widow, and his orphan.” |

## Business Lines and Title Abbreviations The CX KM Team supports the following business lines:

|  |  |
| --- | --- |
| **Business Unit / Program Title** | **Title Abbreviation** |
| Customer Experience | CX |
| Community Care Contact Center | C4 |
| Family Member Programs | FM |
| CHAMPVA | CVA |
| Spina Bifida Health Care | SB |
| Children of Women Vietnam Veterans | CWVV |
| Foreign Medical Program | FMP |
| Traditional Community Care | N/A  **Note:** This is program name, not an audience. |
| Contact Service Representative | CSR |
| Lead Contact Representative | Lead |
| Supervisor | Sup |

## Grammatical Style and Usage

Table 5. Table of commonly-used words capitalization rules

| **Word(s)** | **Style Rule** | **Authoritative Source** |
| --- | --- | --- |
| 1095-B | Number, hyphen, capital B (taken directly from form). | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Active Duty | Two words, capitalized, not hyphenated. |  |
| Airmen | Capitalized | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Blog | Not capitalized | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| cancel (suffix of) | One “l” is preferred for canceling and canceled.  Use two “ll”s for cancellation. |  |
| Central Office | Capitalized, as it’s considered a proper noun. | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Combat Veteran | Two words, capitalized, not hyphenated. |  |
| Cosigners | One word, lower case, not hyphenated. | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| co-workers | Not capitalized, hyphenated. | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Secretary of Veterans Affairs | •The head of our department is formally titled “Secretary of Veterans Affairs.” When the title is first referenced, the full title is used. Subsequent references, however, are “Secretary” or “VA Secretary.”  The first reference to the Deputy Secretary is “Deputy Secretary of Veterans Affairs.” Subsequent references are “Deputy Secretary” or “VA Deputy Secretary.” (Please note: AP style differs from the above departmental policy. When writing news copy we should follow the AP style, which keeps titles in lower case unless followed by a name.) | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| drop-down | Two words, hyphenated. | [Merriam-Webster](https://www.merriam-webster.com/dictionary/drop-down) |
| Email | One word, lower case, not hyphenated | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Enrollment/Eligibility | Two words, capitalized, separated by “/”. Use when referring to the department, office, or staff. |  |
| Facebook | One word, capitalized “F” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Federal | Not capitalized, unless it is part of a proper name | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Flickr | Capitalized. | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Governmentwide | One word. “G” is capitalized if referring to U.S. or foreign government. “g” is lower case if referring to State government | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Guardsmen | Capitalized. | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| health benefits | Two words, lower case unless it is the proper name |  |
| health care | Two words, lower case.  **Notes:**   * Capitalize if it is the proper name of a VA medical center. * In addition, defer to the hospital’s official name, which may have health care as one word versus two words.  **Example:**  VA MidSouth Healthcare Network | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| home-based | Hyphenated |  |
| home page | Two words, lower case | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| internet | Lower case “i” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Intranet | Lower case “i” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| long-term care | Two words, lower case, hyphenated |  |
| medical center | Two words, lower case, unless it is part of a proper name, then capitalize “M” and “C” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| myVA | One word, lower case “my” (even at the beginning of a sentence) |  |
| national cemetery | Two words, lower case, unless it is part of a proper name, then capitalize “N” and “C” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| non-service-connected | Three words, hyphenated |  |
| non-VA | Two words, hyphenated, do not capitalize the “N” unless it is the proper name for example Non-VA Medical Care Department |  |
| Number sign | Definition for the # | Decided among the KM group. |
| Online | One word, lower case, not hyphenated. | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Phone | “phone” and not “telephone,” unless the program name, system, etc., uses “telephone” |  |
| “Program” and “project” | Capitalized only if part of the name | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| provider (community provider) | Lower case  Use provider rather than clinician  Guidance per - VHA’s Office of Regulatory and Administrative Affairs (ORAA) |  |
| regional office | Two words, lower case, unless it is part of a proper name, then capitalize “R” and “O” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Reservists | Capitalized | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| RX, RXs (plural form) | Both letters capitalized |  |
| Sailors/Seamen | Capitalized | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Select | Use “select” rather than “click” |  |
| service-connected | Two words, hyphenated |  |
| service-disabled | Two words, hyphenated | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| service member | Two words, lower case | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Soldiers | Capitalized | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Social Security Number | Three words, capitalized |  |
| State | Lower case “s”, unless it is part of a proper name, then capitalize “S.” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Twitter | Capitalized | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| VA.gov | Capitalize both V and A |  |
| VAMC Enroll\_Elig | Department of Veterans Affairs Medical Center, Enrollment and Eligibility Staff. |  |
| VAntage Point | Two words, capitalized “VA” and “P” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Veteran | Capitalized “V” at ALL TIMES |  |
| Veteran-owned | Two words, hyphenated, capitalize “V” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| web chat | Two words, lower case |  |
| web page | Two words, lower case | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| Website | One word, lower case | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |
| YouTube | One word, capitalize “Y” and “T” | [VHA Style and Usage](https://vaww.va.gov/webcom/style.asp) |

### Table 6. Punctuation rules

|  |  |
| --- | --- |
| **Symbol** | **Rules** |
| Use of a colon | One space after the colon If: Veteran has issues. |
| Use of a comma | The Oxford comma is required:  A comma used after the second to last item in a list of three or more items, before ‘and’ or ‘or’ (e.g. an Italian painter, sculptor, and architect). Also called serial comma. |
| Punctuation (bulleted list) | In cases where a bulleted list consists of fragments *and* complete sentences, do not use periods.   * When possible, avoid using full sentences in bulleted lists.   + If this is not possible, try to use all complete sentences. |
| Punctuation in (Notes and CSR Instructions) | All Notes and CSR Instruction tags must be followed by a colon.  All Notes and CSR Instructions must be complete sentences followed by a period.  Example:  **Note:** All forms must be signed and dated. |
| Spacing after punctuation | Use one space after a period (or other punctuation mark at the end of a sentence) when writing in APA Style. However, if your instructor or non-APA publisher has other requirements (e.g., to use two spaces), follow their specifications. |

## Titles: Naming Conventions

### Knowledge Articles

**No Business Line /Unit**  
Enter full title only if the knowledge article is not specific to any one audience.   
  
Example: Veterans VA Copayment Rates

**Single Business Unit**List the title/space/en dash (−) /space/full Business Unit Title/Program Name (above):

Example: Beneficiary Travel −Traditional Community Care

### Job Aid (JA)/Standard Operating Procedure (SOP)

**No Business Line /Unit**  
For a general job aid (one intended for any Customer Experience Contact Center customer, not necessarily the ones we provide regular support to), no business line is needed and no abbreviation for document type will be used.

* Navigating the Customer Experience Knowledge Management System − Job Aid

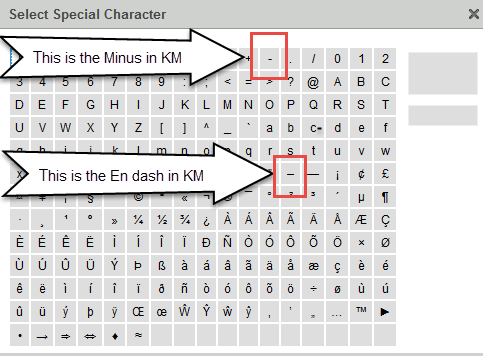
**Single Business Line or Unit**

* List the title/space/minus sign (-)/space/document type (SOP or JA)/ space/ en dash (−) /space/full Business Line/Unit Title (above):
  + Example: Title - JA – CHAMPVA
  + Example: Title - SOP – CHAMPVA
* The Business Unit Title may be abbreviated using an approved abbreviation in JAs and SOPs:
  + Example: Title - JA – CX
  + Example: Title - JA – FM

**Multiple Business Lines**

* When the JA or SOP **does not** apply to every business line within the broader unit, list the document type (BP, SOP, or JA) after the title, using space/ en dash (−) /space to separate it from the title.
* List all business lines covered by the document in parenthesis at the end the title using their abbreviation. (**Note:** Alphabetize the business line abbreviations.)
  + Example: Title − JA (CWVV SB)
  + Example: Title − SOP (CWVV SB)

### Dashes in KM



## Knowledge Management Article Template

Table 8. Info-Map Template

|  |  |
| --- | --- |
| **Overview** | Overview text  Table Settings  cellSpacing: 10  cellPadding: 10  Width: 100%  Border: 0 |
| **Block Title**  Font Type: Arial Bold  Font Size: 16 pt / size 3  Font Color: Black / #111111 /  RGB 17, 17, 17 | Block text 1  Font Type: Arial  Font Size: 16 pt / size 3  Font Color: Black / #111111 / RGB 17,17, 17 |
| **More Information** | Horizontal Rule  HTML Tag <HR>  More Information text |
| **Resource(s)**  Width: 20%  HTML Tag <TD Width=20%> | Resource(s) text |
| **Reference(s)** | Reference(s) text  Font Type: Arial  Font Size: 16 pt / size 2  Font Color: Davy’s Grey / #555555 / RGB 85, 85, 85  Justification: Centered |
| Reviewed: MM/DD/YYYY  HTML Tag<TD Colspan=2> | |

## Blocks

* Blocks chunk relevant information to increase readability.
* The information contained within the block should be limited to one main idea.
* A block is composed of one or more sentences, formulas, or figures.
* Typically, a block has no more than nine sentences.

**  
Block Label**

****Block labels describe the purpose or content of the block. Effective blocks are brief and easy to read.   
  
**Block**

Blocks chunk relevant information to increase readability. The information contained within the block should be organized around a single subject, containing one clear purpose.

Table 7. Info-Map Block

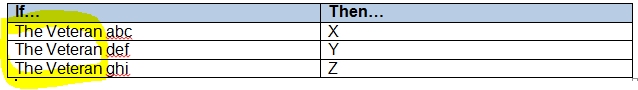
|  |  |
| --- | --- |
| **Block Label** | Block information 1 |

## Tables

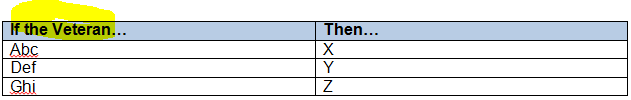
### General Guidelines

* Left justify all **column headers** (EXCEPT step/action tables, which are centered).
* Left justify all **content** in column rows (EXCEPT step numbers and single characters, which are centered).
* All column headers will be set to bold.
* The approved header color is #6699FF / RGB (102, 153, 255).

Review information in columns. If words repeat, move to the column header.



**Change to…**



### If/Then Table

If/Then tables express multiple conditions and the actions to take for each condition.   
 **Text Alignment:** If/Then tables are left justified.

**For Word document templates:**

Table 10. Info-Map If/Then table

|  |  |
| --- | --- |
| **If…** | **Then…** |
| X | Lorem ipsum dolor sit amet, consectetuer adipiscing elit. |
| Y | Maecenas porttitor congue massa. |
| Z | Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. |

### 

### Step Action Tables

#### A Step/Action table breaks a task into step-by-step instructions to achieve a specified outcome.

#### **Formatting:** When possible, begin each Action with a verb (i.e., an action word). Use the same verb for the same action.

##### **Info Mapping Guideline:** Keep step/action tables to 7 +/- 2 steps when possible.

##### **Alignment:** Step/Action headers are centered. The numbers in the “Step” column are centered. The instructions in the “Action” column are left justified.

##### **Column Width In KMS:** Use the following column widths

##### Step column: 7%

##### Action column: 93%

Table 9. Info-Map Step/Action table

|  |  |
| --- | --- |
| **Step** | **Action** |
| 1 | Click…  **a.**  **b.**  **c.** |
| 2 | Press… |
| 3 | Select… |
| 4 | Click... |

## Bulleted Lists

* Use a numbered list rather than bullets if your action items need to take place in a specific order.
* Bullets must be consistently formatted/structured:
  + Keep all bullets consistent (i.e., either all sentences or all fragments).
  + Start each bullet with the same part of speech (e.g., if you start one point with a verb, start them all with a verb).a
* Keep punctuation consistent within the bulleted list.
* Keep bullets concise.
* Capitalize the first letter of each bullet.
* Use Enter (i.e., no blinking cursor space) between a bulleted list and a notice intended for the CSR (e.g., Note, CSR Note, Important).
* Sub-bullets must be limited to 3 levels.

## Hyperlinks

A hyperlink is text or an image you can select to jump to another document.

### Links within Text

KMS KM article hyperlinks in text that is being read to a caller (“dropped into running text”) should have display text that conforms to the conventions of standard edited English.

**Examples:**

* You can [register](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001046/content/554400000049532/(HD)-Vets.gov-Account-Registration) to track your claim status on VA.gov.
* If you are a former [prisoner of war (POW)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001046/content/554400000049156/Former-Prisoners-of-War), you may be eligible for any needed dental care.

### In-Text URLs (Web Addresses) a uniform resource locator (url) is the address of a web page.

#### URL for Reader/User

All URL’s intended as a Resource for users/readers must contain the correct hyperlink and display the fully qualified URL be hyperlinked with the full address (i.e., http://www.va.gov **not** [www.va.gov](http://www.va.gov)).   
  
**Important:** You must add a clear description of the link destination instead of only providing the URL. This description will display in the pop-up that appears when users hover overactive hyperlinks. For more information, refer to the CX 508 Job Aid.

**Example:** For more information, visit [http://www.va.gov](http://www.va.gov/).  
  
**Note:** The URL may be replaced by running text in cases where the link is internal only:

#### URL for Caller (Only) URLs with no hyperlink may be used where the website is being provided to a caller **only**. **Example:** Visit www.va.gov for more information.

### Email Hyperlinks

See the table below for guidance on formatting email hyperlinks/addresses.

| **Email Address Type** | **Purpose** | **Email Address Format** | **Examples** |
| --- | --- | --- | --- |
| Internal (VA) | Directions to employees | The name of the Microsoft Outlook/Global Address Locator (GAL) email group/individual with a hyperlink created for the email address.  **Note:** Our style preference is to use an email group or position title, not an individual’s name. | Email the [VHA MS ESS Knowledge Management](mailto:VHAMSESSKM@va.gov) team.  **Note:** If the business unit wants to emphasize that the email needs to be encrypted:  Send an encrypted email to the [VHA MS ESS Knowledge Management](mailto:VHAMSESSKM@va.gov) team. |
| External (Non-VA) | Directions to employees | Use only the email address. | Email [24x7VRMCRMSupport@bah.com](mailto:24x7VRMCRMSupport@bah.com). |
| Internal/External | Article that can be read to callers | The name of the Microsoft Outlook/Global Address Locator (GAL) email group/individual at the email address.  **Note:** Our style preference is to use an email group or position title, not an individual’s name. | Email the LGBT Program Staff at [LGBTProgram@va.gov](mailto:LGBTProgram@va.gov). |

Inserting Hyperlinks in Word Documents and Emails

When inserting hyperlinks in Word documents, browse to the appropriate article in the KMS and use that path for the hyperlink **minus the search terms**.  (Searching for the KM article and using that path for the hyperlink will highlight the search keywords.)

* Correct:  <https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001046/content/554400000049124/Dental-Care>
* Incorrect:  <https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001046/content/554400000049124/Dental-Care?query=dental%20care>

### Word Document/PDF Publication Guidelines

* Prior to publishing a Word document, review all tables and how they break across pages.
  + **Note:** This step can be time-consuming and is not recommended for a preliminary draft where the content is still under review by the business unit.
* Do not break rows/steps, etc., across pages unless unavoidable. Adjust spacing by:
  + Adding extra spaces by clicking “Enter”
  + Removing extra spacing (such as an extra white space line in the table or between the stem sentence and the table)
  + Adjusting column width within the table to add/remove extra line spaces
  + Reformatting/editing the content so that there is less content, if the content is so long that it must break across the page or have an excessive amount of white space to keep the step together on the same page.
  + Moving the ruler guides to move the bullets left and eliminate extra white space.



## **Time**

**These articles will need approval from the business line as well as Veterans Transportation Services.**

#### Time of Day

The Latin phrase "a.m." stands for Ante Meridiem -- before noon and "p.m." stands for Post Meridiem -- after noon. When writing time in the KMS, insert a space between the time and the abbreviation and use periods in the abbreviation.

* Format hours as 7:00 (colon followed by 2 zeros) for times on the hour.
* For time ranges, format as 7:00 a.m. – 3:30 p.m. (MT)
* For time/day of the week ranges, “between the hours of 7:00 a.m. and 4:00 p.m. (MT), Monday – Friday”

#### Time Zones

Along with the time, provide the time zone, such as Eastern Time (ET) or Central Time (CT). The preferred method is to convert time to Mountain Time (MT) for consistency.

## Date

If content is intended to be read to a caller, then 03/05/1988 should be typed out as May 3, 1988.

If the date is used internally (Ex: Reviewed Date) then it should be typed as 05/03/1988.

* **Note:** At times, the CSR will need to explain the date **format** to the caller for a field or form,
* Use the following format to indicate the date format to the CSR (depending on the form or field requirements):
  + 4-digit year: MM/DD/YYYY or MMDDYYYY
  + 2-digit year: MM/DD/YY or MMDDYY

## Formatting Phone Numbers

* Use dashes without parenthesis
* Toll free numbers we are adding a “1” in front of the number
* Regular phone numbers we will not add a “1” in front of the number
* Place full phone number without dashes in KM>Metadata tab>Keywords

For example:

* Toll free numbers – 1-800-827-1000
* Regular numbers – 202-123-4567

## Numbers in Articles

* Use the number instead of spelling out the number

## Documentation Standards

This is the order of preference to list in the KMS (if applicable):

* USC
* Public Law
* CFR
* Federal Register
* Directive
* Policy Manual
* (VHA) Handbook

**Note**: If more than one of the same document type is listed, then place them in ascending order.

Example:

VHA Directive 1172.01

VHA Directive 1184

#### Directives

Directives establish mandatory VHA polices. Use for following format to document Directives in the KMS.

|  |
| --- |
| “VHA Directive”, Directive Title, Directives Number, Issue Date (long date format) |
| VHA Directive 1605.01, Privacy and Release of Information, August 31, 2016  **Notes:**   * Use the document type and document number, title, and date of the reference in the Reference block. * Add the publication number (Ex: 1605) as a keyword. This will make searching for the location easier. |

#### Handbooks

Handbooks prescribe mandatory VHA procedures and or operational requirements. Use for following format to document Handbooks in the KMS.

|  |
| --- |
| “VHA Handbook”, Handbook Number, Handbook Title, Issue Date (Long Date Format) |
| VHA Handbook 1330.03, Maternity Health Care and Coordination, October 5, 2012  **Note**: Use the document type and document number, title, and date of the reference in the Reference block. |

#### Code of Federal Regulations (CFR)

CFR is general and permanent rules published in the Federal Register by the executive departments and agencies of the Federal Government. Use for following format to document CFR’s in the KMS.

|  |
| --- |
| CFR title, Part Number, Section Number |
| Title 38 CFR 17.34(b) Note: 38 CFR 17.34 refers to title 38, part 17, section 34 |

#### Public Law (PL)

When the president signs a law, the law receives a number in the order in which it is signed. A citation to a public law looks like this:

|  |
| --- |
| “PL” Chapter Number-Section Number |
| PL 107-101  Note: “107" indicates this law was passed during the 107th Congress and 101 is the numerical designation it received |

#### United States Code (USC)

The U.S. Code is organized by subject area into 50 titles. Titles are further broken down by chapter and section. Citations to the U.S. Code look like this:

|  |
| --- |
| United States Code Title Chapter Number Section Number |
| 42 USC 1382 or 42 § 1382 Note: (This means the law appears in title 42, section 1382 of the Code) |

#### Information Bulletins (IB)

|  |
| --- |
| “IB” IB Number, IB Title, Issue Date (Long Date Format) |
| IB 10-442, Dental Benefits for Veterans, January 1, 2013 |

#### Chief Business Office (CBO) Procedure Guide

Handbooks prescribe mandatory VHA procedures and or operational requirements. Use for following format to document Handbooks in the KMS.

|  |
| --- |
| “VHA Handbook”; Handbook Number; Issue Date (Long Date Format) |
| VHA Handbook 1000.01, January 1, 2014 |

Office of Finance, Office of Financial Policy (OFP) - Financial Policy Volumes

The Financial Policy provides VA-wide financial policies and procedures for compliance with all financial laws and regulations. Use for following format to document Financial Policies in the KMS.

|  |
| --- |
| “VA Financial Policies and Procedures”,; Volume Number (Roman Numerals); Chapter; Title; Issue Date (Long Date Format) |
| VA Financial Policies and Procedures, Volume XII – Chapter 1B, Waiver of Debts, May 27, 2010 |

#### M21-1MR

A citation to a public law looks like this:

|  |
| --- |
| “M21-1MR”, Part (Upper Case Roman Numerals), Subpart (Lower Case Roman Numerals), Chapter (Western Arabic Number), Section (Upper Case Letter) |
| M21-1MR, Part III, Subpart v, Chapter 1, Section B |

#### Operational Policy Manuals

A citation to Operational Policy Manuals looks like this:

|  |
| --- |
| Policy Manual Name: Chapter, Section – Policy Title |
| CHAMPVA Policy Manual: Chapter 2 – Benefits CHAMPVA Policy Manual: Chapter 2, Section 18 – Mental Health  CHAMPVA Policy Manual: Chapter 2, Section 18.6 – Psychological Testing CHAMPVA Policy Manual: Chapter 2, Section 18.6(III)(C) – Psychological Testing |

#### VA Forms

A citation to VA Forms looks like this:

|  |
| --- |
| “VA Form” VA Form Number, VA Form Title |
| VA Form 21-4138, Statement in Support of Claim |

#### Fact Sheets

|  |
| --- |
| Full Fact Sheet Title (“Fact Sheet” Number) |
| CHAMPVA Pharmacy Benefits (Fact Sheet 01-05) |

Attachments  
  
Place attachments in the Resources block as a callout to users.

* Capitalize the name of the attachment according to AP standards for a title.
* Rename the original document may need to be renamed to meet AP title standards.

|  |
| --- |
| Full attachment name (“Attachments”) |
| CHAMPVA Welcome Letter With Blank ID Card - Sample (Attachments) |

# Standard Article Blocks

## Overview Block

The Overview block will be used for Knowledge Articles; these articles will provide generic information only. The Overview should…

* Be no more than two sentences.
* Begin with the approved [SEO Summary](#_Seo_Summary/Overview) unless the Content Owner requests otherwise.
  + **Note:** Abbreviations may be used in the SEO summary for conciseness.
* Contain general information only.
  + **Important:** Do not put important or pertinent information in the Overview block. However a **Note:** or **Important:** tag may be used in this block to save the reader time.

## Purpose Block

The Purpose block is the overview in a JA or SOP article.

The Purpose should…

* Be no more than one sentence, unless otherwise requested by the Content Owner.
* Match the approved [SEO Summary](#_Seo_Summary/Overview).
  + **Note:** Abbreviations may be used in the SEO summary for conciseness.
* Contain general information only.
* **Important: DO NOT** put important or pertinent information in the Purpose block.
  + However a “Note:” or “Important:” note may be used in this block to redirect the reader to a more appropriate article:
    - Example: **Note:** This JA does not apply to a Community Care Network (CCN escalations).

## Audience Block

* Use the program name only with abbreviation, if applicable (e.g., CHAMPVA).
* An alternate name may be used when the Content Owner requests otherwise.
  + Example: “Specialty CSRs” for SB **and** CWVV JAs and SOPs
* “VA Staff” will only be used for articles intended to be used by all VA Employees or VA-wide (e.g., MISSION Act).

Table 14. Audience block:

|  |  |
| --- | --- |
| **Audience** | Family Member (FM) |

## Definitions

Only used for Remark Code Job Aids or for terms that are not common knowledge to the CSRs

* All terms will be alphabetized
* This block will be formatted as Term in bold text, En dash in bold text (**–**), Definition

Example – Definitions block

|  |  |
| --- | --- |
| **Definitions** | **DOMA –** DOMA Technologies, LLC (DOMA) provides data and document management software and services that streamline operations of users worldwide. |

## Additional Assistance / Questions Block

This block explains where the reader can obtain more help or ask for clarification.

* If the block provides resources for the caller and not the reader, label the block “Additional Assistance for (Callers/Veterans/Beneficiaries etc.)”

## More Information Block

This block is used to direct the reader to an important resource for more details. This may be used in cases where only a portion of a document was used to create the article or in cases where there is a publication or website specifically dedicated to the title.

## **Contact Service Representative (Employee) Instructions**

Contact Service Representative (CSR) (or VA employee) instructions provide small chunks of guidance for actions to take.

When providing these instructions, use bold, black font:

**C4 CSR Note:**

Table 13. Contact Rep Instructions block:

|  |  |
| --- | --- |
| **C4 CSR Instructions** | Do X, Y, then Z. |

## **Resources/Related Resources Block**

The Resources (KA) Related Resources (JA/SOP) blocks will contain links for the reader/user, **not the caller**, therefore a descriptive name may be used in place of the URL.

The Resource(s) blocks contain hyperlinks to:

* Knowledge Articles (KA)
* Business processes (BPs)
* Job aids (JAs)
* Standard operating procedures (SOPs)
* VA websites, or
* Other resources that have been vetted and approved by the business line content owner.

**Important:** Do **not** place a space between Resources.

Table 11. Info-Map Resource Block Examples:

|  |  |
| --- | --- |
| **Resources** | [VA Website](http://www.va.gov/)  [Lorem Ipsum](http://www.lorem-ipsum.com/) |

### Hierarchy of Resources

If a KA, BP, JA, and SOP all need to be listed as Resources, listed below is the order of preference:

* KA (if more than one is mentioned, go in alphabetical order for eGain KM system references)
* JA (if more than one is mentioned, go in alphabetical order)
* SOP (if more than one is mentioned, go in alphabetical order)
* Guide (if more than one is mentioned, to in alphabetical order)
* Policy Manual (if more than one is mentioned, go in numerical order)
* Internal resources
* External resources
* Attachments (format as follows)
  + **Example:** Letter to Beneficiaries (Attached)

### Knowledge Articles as Resources

Use this format: KM Article, colon, space, full article title “KM Article: Family Member Pharmacy Benefits”

This format should be used when:

* The user is being referred to a knowledge article for more details within the body of the article.
* Using a Knowledge Article in the Resources / Related Resources blocks.

See the table below for Knowledge Article Resource examples.

|  |
| --- |
| KM Article: Title |
| KM Article: [Agent Orange Exposure](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001046/content/554400000049153/Agent-Orange-Exposure) |

### Job Aids and SOPs as Resources

Use the full title of article when using a JA or SOP as a resource in the Resources block.

When using a JA or SOP as a resource within the body of an article, use one of the full title of article:

* **Example:** For more information, refer to [Transferring Calls to VA Medical Facilities - SOP – CX](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001045/content/554400000123808/Transferring-Calls-to-VA-Medical-Facilities-SOP?query=sop).

**Exception:** This does not apply to ‘running text’ where one word is linked to another article.

* **Example:** A DME purchase or rental over $2000 requires a [preauthorization](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001045/content/554400000072649/Preauthorization-Guidelines-–-CHAMPVA).

|  |  |
| --- | --- |
| **Resources** | [Transferring Calls to VA Medical Facilities - SOP – CX](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001045/content/554400000123808/Transferring-Calls-to-VA-Medical-Facilities-SOP?query=sop) |

## **References Block**

Reference blocks identify and credit the source material used in the creation of the KA.

**Important:**

* Hyperlinks are prohibited in this block.
* Do **not** place a space between references.

Table 14. Info-Map Reference block (below)

|  |  |
| --- | --- |
| **References** | Title 38 CFR 17.272 Title 38 CFR 17.274 |

## Associated Knowledge Management Article(s)

This block is used to identify related Knowledge Articles in job aids.

* Place in the Associated Knowledge Management Article(s) block using the exact title*.*
* Do **not** place JAs or SOPs in this block.

|  |  |
| --- | --- |
| **Associated Knowledge Article(s)** | Family Member Pharmacy Benefits |

# Approved Summaries and Alt Text

## Seo Summary/Overview/Purpose

The Metadata SEO Summary is used to provider KM users a summary of what is in the article.

The Seo Summary should also be used in the Overview and Purpose blocks

The following will be used for the Seo Summary/Overview/Purpose.

* **Note:** Abbreviations may be used in the SEO summary for conciseness.

Knowledge Articles:

* This article provides information about…
* This article provides guidance for…
* This article details…

Job Aids:   
This job aid (JA) instructs *(insert business unit used in the Audience block)* (*enter job title/role-spelled out*) how to…

* Example:
  + This job aid (JA) instructs CHAMPVA Contact Service Representatives (CSRs) how to…
  + This job aid (JA) instructs CX staff how to…

Standard Operating Procedures (SOP)

This standard operating procedure (SOP) establishes the appropriate procedure(s) for…

* If audience specific/job title specific):
  + This standard operating procedure (SOP) provides (*enter business unit used in the Audience block*)(*enter job title/role-spelled out*) with the appropriate procedure(s) for…
    - Example: This standard operating procedure (SOP) provides C4 staff with the appropriate procedure(s) for…
    - Example: This standard operating procedure (SOP) provides CHAMPVA CSRs with the appropriate procedure(s) for…

Frequently Asked Questions (FAQs)

(*Enter business unit used in the Audience block*)(*enter job title/role-spelled out*) will use these Frequently Asked Questions (FAQs) to effectively handle questions about…

* + Example: CHAMPVA CSRs will use these Frequently Asked Questions (FAQs) to effectively handle questions about…

## Tables

The following will be used for table summaries:

* This table provides if/then conditions to…
* This If/then table provides instructions for/details how/explains etc.
* This step/action table provides instructions for/details how/explains etc.
* This table provides steps to…
* This table provides guidance for …

## Images

The following will be used for table summaries:

* This is an image of…
* This is a picture of…

## Summary Notes in eGAIN (KM Authoring Console)

When an article is published in eGAIN (KM Authoring Console), the “Enter Summary – Webpage Dialog” box will appear. Leave a note in the “Summary” box.

* At a minimum, the note **must** summarize what you changed and who concurred **(Note:** Concurrence not required for visual changes and grammar and spelling errors).
* May also include:
  + Subject of the email request
  + Date of request
* **Important:** Be sure to check the “Include in new updated article list in portal” box. You will only check this box when:
  + A new article is published to the live (production) site
  + An existing article is updated (i.e., a change to the guidance - NOT grammar, visual updates, spelling, etc.)

# Navigating Large Articles

For large articles (i.e., articles with more than 9 blocks or expansive tables), add a Quick Access Menu with anchors toward the top of the article.

The Quick Access Menu:

* Will Be used instead of a Navigation Menu.
* Should appear after Purpose and Definitions.
* Must include the stem/intro sentence in the Example – Quick Access Menu below.
* Must include Topics as they appear in the block title they are anchored to.
* Must consist of Topics listed using a bulleted list.

Example – Quick Access Menu

|  |  |
| --- | --- |
| **Quick Access Menu** | Click the appropriate topic below to be taken directly to information for that topic:  • XXXX  • XXXX |

# Section 508 Compliance

Table 12. 508 table

| **Type** | **Description** |
| --- | --- |
| URL | All URL’s must contain the correct hyperlink and display the fully qualified URL be hyperlinked with the full address (i.e., http://www.va.gov not www.va.gov)  All URL’s must be linked to active Web destination. |
| Images | All images, grouped images and non-text elements that convey information must have alternative text description. |
| Color | The use of color can be used to convey important content; it cannot be the sole means of classification. Mark required fields with an asterisk \* |

# Standard Article Responses

Below are responses to common situations. These responses can be customized to meet the specific situation.

Table 14. Standard response table

| **Situation** | **Response** |
| --- | --- |
| Authorized  Article Change | To leadership/Content Managers:   * Thank you for the information. We will work on verbiage to address this issue. * Thank you. We will update the article to include the information as requested. * Thank you for the information <Name>. We will review it to determine impact on KM articles. |
| Unauthorized Article changes | Thank you for your feedback regarding the following article:  (INSERT NAME AND NUMBER)  Please utilize the process outlined in [KM Article: Submitting Questions\_Comments](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001046/content/554400000049147/Submitting-Questions-Comments) to submit KM article revisions and/or additions.   **Note:** The following is a list of exceptions to this procedure:   * Spelling errors * Grammatical errors * Visual (formatting) errors * Additional Keywords * Broken links * VA Regulatory changes |
| Article Changes / Requests / Suggestions – Authorization Required | To leadership/Content Managers:  We have received the following comment on (KM Article with link).   * Please advise if you feel a change to the article is required. **OR** * Please advise how you would like us to respond to this comment and/or if you feel a change to the article is required. |
| Article Change – Requesting Concurrence from Leadership | Please review the attached draft and provide review and concurrence  Please review the verbiage below and provide concurrence. |
| Article Updates | Article has been updated.  Article updates have been made to the KMS. |
| KM Suggestion Box | We are writing in response to your feedback submitted to the Community Care Customer Experience KM Portal.   (Insert action taken.) (Refer to existing KM Article)  We will continue to work with leadership to improve content and the process for suggestions and feedback.  Thank you for your suggestion,  NAME  CX KM Team |

# Revisions

| **Date of Change** | **Change** |
| --- | --- |
| 06/16/2020 | Added Related Resources to the Resources section |
| 06/18/2020 | Updating the way we reference **specific sections** of a policy to match PMD |
|  |  |