

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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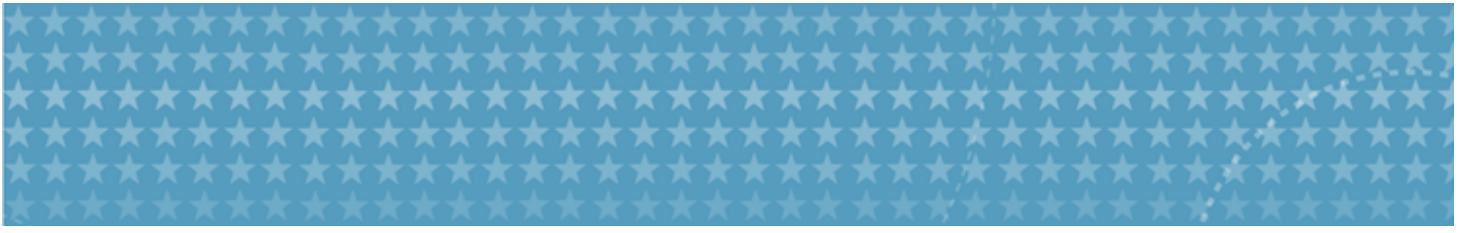


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INTRODUCTION

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](#)



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 *entered* 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](#).

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](#))
 - 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
ABCDEFGHIJKLMNPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz 1234567890 (~!@#\$%^&*)

Table 2. Table of bolded letters in Arial font

Arial Bold
ABCDEFGHIJKLMNPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz 1234567890 (~!@#\$%^&*)



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:

C4 / FM CSR	Cold transfer <u>supported calls</u> to Signature using the appropriate <u>direct transfer number</u> . IMPORTANT: <ul style="list-style-type: none">• DO NOT PROVIDE THE DIRECT TRANSFER NUMBER TO THE COMMUNITY PROVIDER.• DO NOT INFORM THE CALLER THAT SIGNATURE IS NOW HANDLING PROVIDER CALLS.
-------------	--

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.

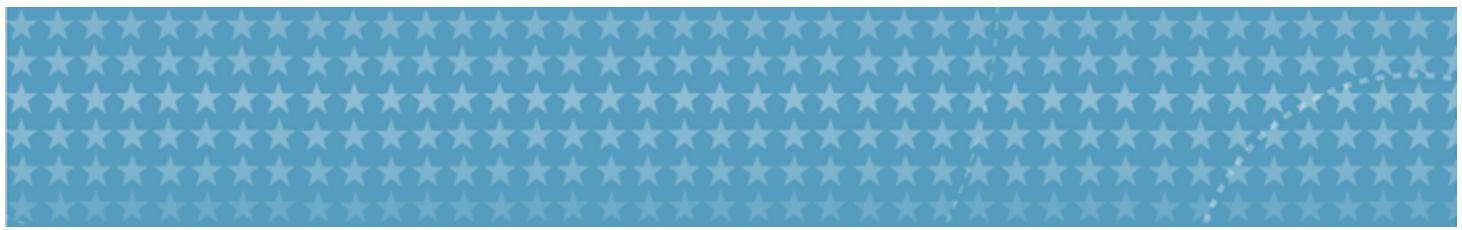
- Always spell out the full name, title, or phrase the first time you refer to it in text, followed immediately by the acronym/abbreviation in parentheses.
 - **Example:** Posttraumatic Stress Disorder (PTSD)
- Use the acronym/abbreviation for **each and every** subsequent use.
- It is **not** necessary 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](#).

Table 3. Table of commonly used acronyms



Name	Abbreviation	Authoritative Source
American Federation of Government Employees	AFGE	AFGE website
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	
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
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 HealtheVet	MHV	
National Cemetery Administration	NCA	VHA Style and
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
Veterans Health Administration	VHA	
Veterans Health Information Systems and Technology Architecture	VistA	
Veterans Integrated Service Network	VISN	VHA Locations web page
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 6 th) 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 <i>exempli gratia</i> – 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.	<p>Abbreviation for the Latin <i>id est</i> – 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.</p> <p>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.)</p> <p>To create a separate clause, use i.e. followed by a comma within parentheses:</p> <p>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).</p>	
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 6 th)	
versus	vs. (GPO style guide; however, MLA 6 th 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

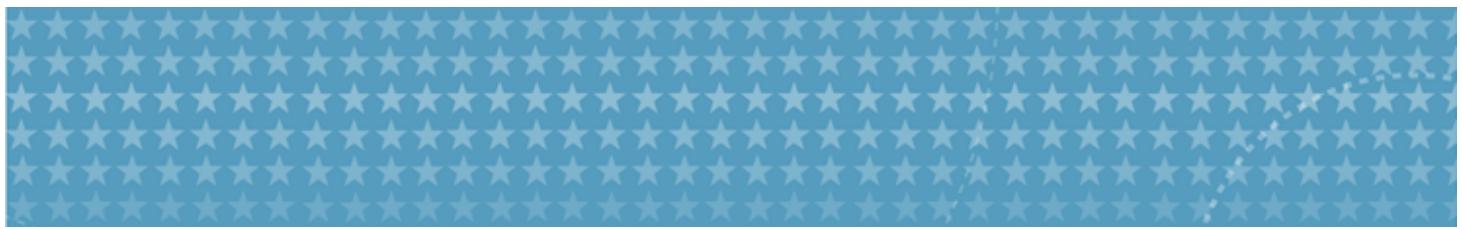
THE CX KM TEAM SUPPORTS THE FOLLOWING BUSINESS LINES:

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

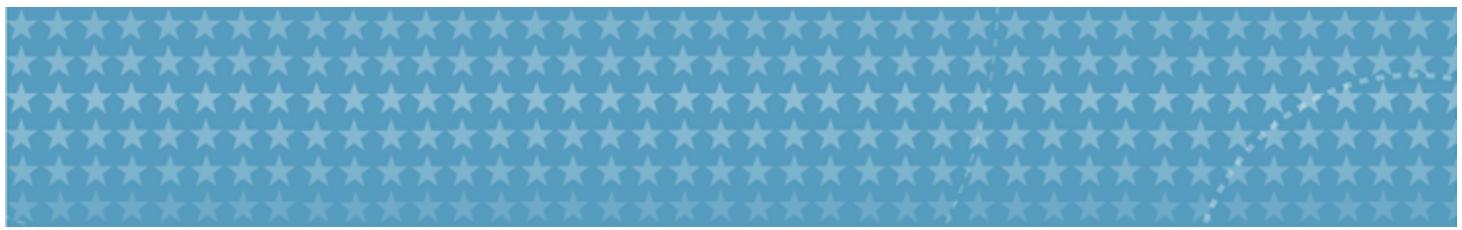
Word(s)	Style Rule	Authoritative Source
1095-B	Number, hyphen, capital B (taken directly from form).	VHA Style and Usage
Active Duty	Two words, capitalized, not hyphenated.	
Airmen	Capitalized	VHA Style and Usage
Blog	Not capitalized	VHA Style and Usage



Word(s)	Style Rule	Authoritative Source
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
Combat Veteran	Two words, capitalized, not hyphenated.	
Cosigners	One word, lower case, not hyphenated.	VHA Style and Usage
co-workers	Not capitalized, hyphenated.	VHA Style and Usage
Secretary of Veterans Affairs	<ul style="list-style-type: none">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.” <p>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.)</p>	VHA Style and Usage
drop-down	Two words, hyphenated.	Merriam-Webster
Email	One word, lower case, not hyphenated	VHA Style and Usage
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
Federal	Not capitalized, unless it is part of a proper name	VHA Style and Usage
Flickr	Capitalized.	VHA Style and Usage
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



Word(s)	Style Rule	Authoritative Source
Guardsmen	Capitalized.	VHA Style and Usage
health benefits	Two words, lower case unless it is the proper name	
health care	Two words, lower case. Notes: <ul style="list-style-type: none">• 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
home-based	Hyphenated	
home page	Two words, lower case	VHA Style and Usage
internet	Lower case "i"	VHA Style and Usage
Intranet	Lower case "i"	VHA Style and Usage
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
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
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.



Word(s)	Style Rule	Authoritative Source
Online	One word, lower case, not hyphenated.	VHA Style and Usage
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
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
Reservists	Capitalized	VHA Style and Usage
RX, RXs (plural form)	Both letters capitalized	
Sailors/Seamen	Capitalized	VHA Style and Usage
Select	Use “select” rather than “click”	
service-connected	Two words, hyphenated	
service-disabled	Two words, hyphenated	VHA Style and Usage
service member	Two words, lower case	VHA Style and Usage
Soldiers	Capitalized	VHA Style and Usage
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
Twitter	Capitalized	VHA Style and Usage



Word(s)	Style Rule	Authoritative Source
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
Veteran	Capitalized “V” at ALL TIMES	
Veteran-owned	Two words, hyphenated, capitalize “V”	VHA Style and Usage
web chat	Two words, lower case	
web page	Two words, lower case	VHA Style and Usage
Website	One word, lower case	VHA Style and Usage
YouTube	One word, capitalize “Y” and “T”	VHA Style and Usage

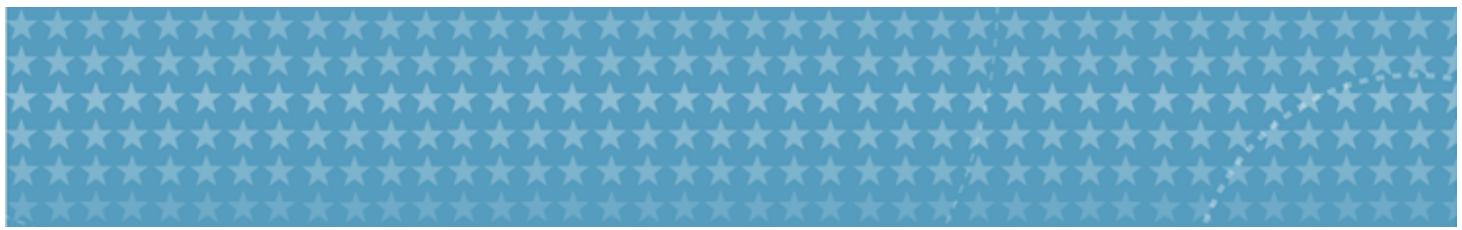


TABLE 6. PUNCTUATION RULES

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 <i>and</i> complete sentences, do not use periods. <ul style="list-style-type: none">• 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.

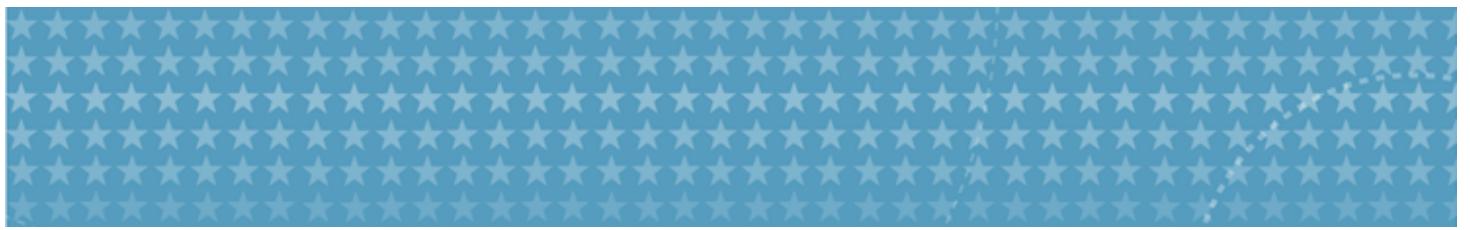
- Navigating the Customer Experience Knowledge Management System – Job Aid

Single Business Line or Unit

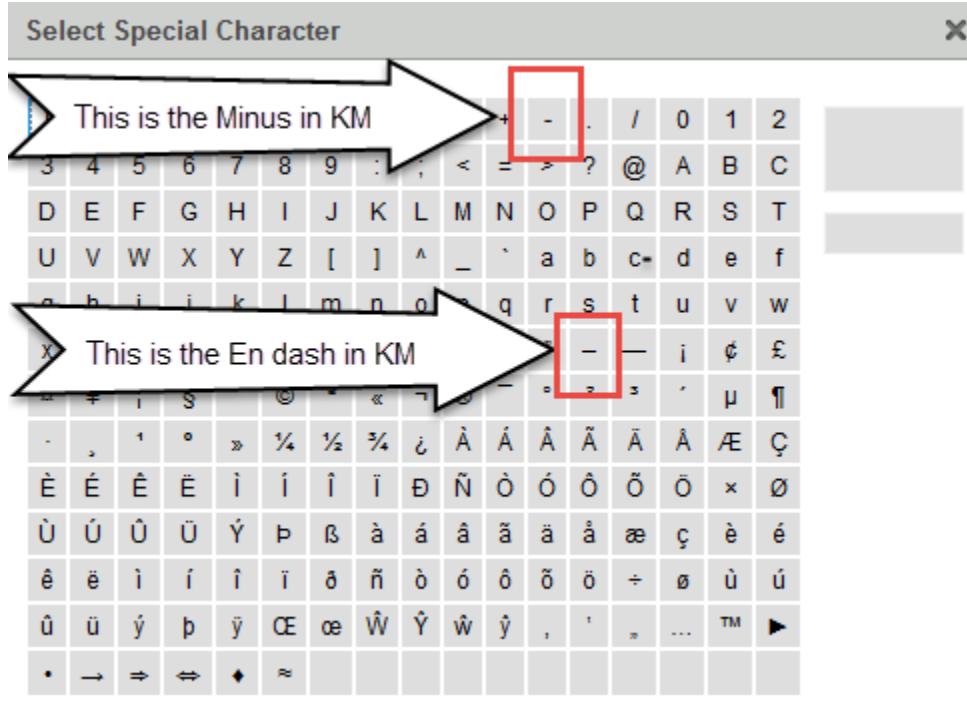
- List the title/space/minus sign (-)/space/document type (SOP or JA)/ space/ en dash (-) / space/full Business Line/Unit Title (above):
 - Example: Title - JA – CHAMPVA
 - Example: Title - SOP – CHAMPVA
- The Business Unit Title may be abbreviated using an approved abbreviation in JAs and SOPs:
 - Example: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



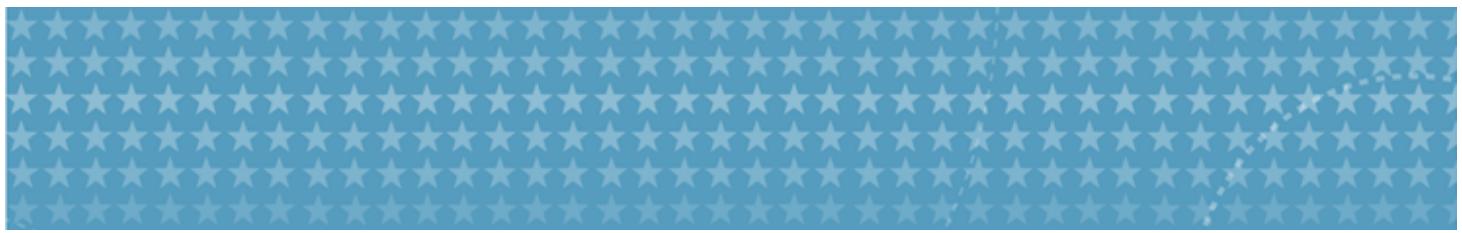
DASHES IN KM



KNOWLEDGE MANAGEMENT ARTICLE TEMPLATE

Table 8. Info-Map Template

Overview	Overview text
Block Title	Block text 1
More Information	More Information text
Resource(s)	Resource(s) text



Reference(s)	Reference(s) text
Reviewed: MM/DD/YYYY	

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 ①

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

Block ②

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.



If...	Then...
The Veteran abc	X
The Veteran def	Y
The Veteran ghi	Z

Change to...

If the Veteran...	Then...
Abc	X
Def	Y
Ghi	Z

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](#) to track your claim status on VA.gov.
- If you are a former [prisoner of war \(POW\)](#), 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](#)).

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 over active hyperlinks. For more information, refer to the CX 508 Job Aid.

Example: For more information, visit <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 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 team.
External (Non-VA)	Directions to employees	Use only the email address.	Email 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 .

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/55440000001046/content/554400000049124/Dental-Care
- Incorrect: https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/55440000001046/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.

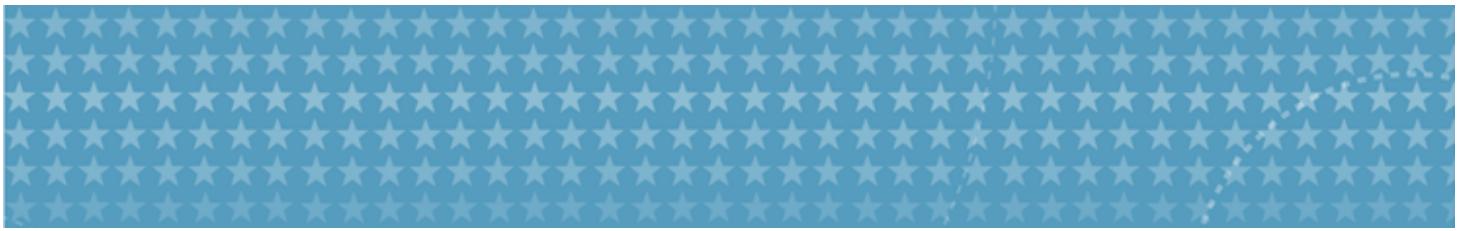
- Format hours as 7:00 (colon followed by 2 zeros) for times on the hour.
- For time ranges, format as 7:00 a.m. – 3:30 p.m. (MT)
- For time/day of the week ranges, “between the hours of 7:00 a.m. and 4:00 p.m. (MT), Monday – Friday”

Time Zones

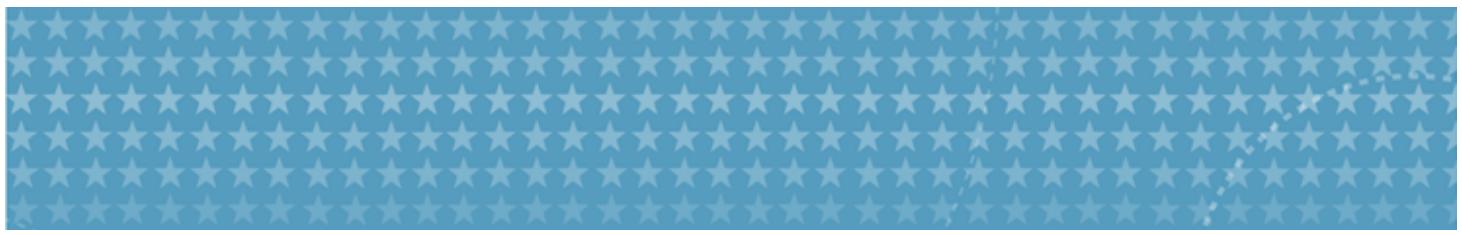
Along with the time, provide the time zone, such as Eastern Time (ET) or Central Time (CT). The preferred method is to convert time to Mountain Time (MT) for consistency.

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 policies. 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 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](#) 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](#).
 - **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)
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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	<u>VA Website</u> <u>Lorem Ipsum</u>
------------------	---

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, go 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

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](#).

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](#).

Resources	Transferring Calls to VA Medical Facilities - SOP – CX
-----------	--

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
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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...



(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
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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	<p>To leadership/Content Managers:</p> <ul style="list-style-type: none">○ 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	<p>Thank you for your feedback regarding the following article: (INSERT NAME AND NUMBER)</p> <p>Please utilize the process outlined in KM Article: Submitting Questions_Comments to submit KM article revisions and/or additions.</p> <p>Note: The following is a list of exceptions to this procedure:</p> <ul style="list-style-type: none">• Spelling errors• Grammatical errors• Visual (formatting) errors• Additional Keywords• Broken links• VA Regulatory changes
Article Changes / Requests / Suggestions – Authorization Required	<p>To leadership/Content Managers:</p> <p>We have received the following comment on (KM Article with link).</p> <ul style="list-style-type: none">○ 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	<p>Please review the attached draft and provide review and concurrence</p> <p>Please review the verbiage below and provide concurrence.</p>
Article Updates	<p>Article has been updated.</p> <p>Article updates have been made to the KMS.</p>



Situation	Response
KM Suggestion Box	<p>We are writing in response to your feedback submitted to the Community Care Customer Experience KM Portal.</p> <p>(Insert action taken.) (Refer to existing KM Article)</p> <p>We will continue to work with leadership to improve content and the process for suggestions and feedback.</p> <p>Thank you for your suggestion,</p> <p>NAME CX KM Team</p>

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

