Inquiry Routing & Information System (IRIS)

Version 10 Instruction Guide

December 29, 2010

TABLE OF CONTENTS

Introduction

The Inquiry Routing and Information System (IRIS) is a Web based, Internet messaging application. While it is assumed that IRIS is a form of e-mail, technically speaking, *IRIS is not e-mail*. The *alerts* sent to responders telling them that they have IRIS traffic is managed via e-mail, but those messages have links to get into the IRIS server to actually see electronic message content. The messages received by veterans saying that VA has response for them are e-mail, but those messages have links in them to the IRIS server to see the response. Please remember that distinction. All messages received from the public via IRIS and responses to those messages are made through encrypted connections with a secure Internet data server. All message data and responses remain on the server. All sensitive data is protected according to current VA standards.

This manual is intended for any VA staff member responsible for responding to messages from anyone using the IRIS messaging application. The manual contains information about:

- accessing the IRIS
- bookmarking the IRIS URL
- launching the IRIS
- describes the Inquiry Console home screen that appears after logging in and the information contained on that console including toolbars, the navigation and content panes, tabs and subtabs and also describes:
    - how to navigate the Inquiry Console Home screen
    - procedures for working with inquiries, including viewing, editing, and responding to inquiries
    - using FAQs and Standard Text responses and their hotkeys
    - using search features
- customer entry on behalf of an inquirer/veteran
- accessing other consoles/screens and features
- glossary of terms
- troubleshooting information

Resources for IRIS Users on the IRISInfo Intranet website:

Information about the IRIS, its background, and a host of useful documents can be found at http://vaww.va.gov/irisinfo. There is also a direct link to this website via the IRISInfo Website Help tab that is available on any open inquiry. Documents that all responders should utilize are:

- IRIS Participants Dropdown List: this document lists all mailgroups in the IRIS in order of appearance in the dropdown listings and also provides information about service areas and/or other special considerations
- IRIS FAQs: This document prints out the contents of all FAQs in the IRIS Knowledge Base
- Standard Text (was Standard Responses): This document prints out the folder, label, and contents of all Standard Text Responses available to responders.
- Written instruction guide that contains screenshots, descriptions, etc. for using the IRIS.

Documents can be downloaded to responders' machines or viewed on the Website. To do a search of any documents, do Control+F to open a search box to help find what you are looking for; *be sure that your cursor is on text in the content and not the text in the callout boxes.*

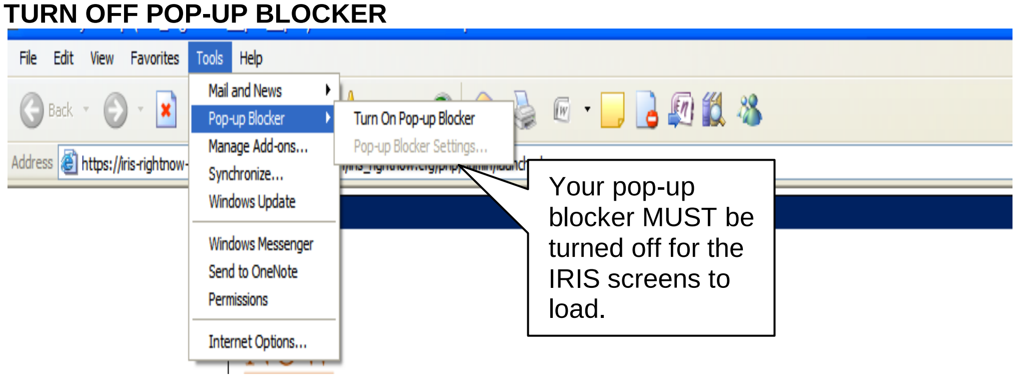
Documents are routinely updated to ensure their currency. The dates of the respective documents can be found at the top of the first page of each document.

Launching IRIS to get started; required browser settings

If your machine has already run the previous version, IRIS v8, you should have no problem running the newest version**; however, if you can't successfully run the IRIS, your Internet browser must be adjusted.** Download the browser settings documents from http://vaww.va.gov/irisinfo/irisguides.asp. (VBA employees should already have the IRIS listed in the VBA master menu with the browser settings adjusted.) In addition to the browser settings, the following must be set.

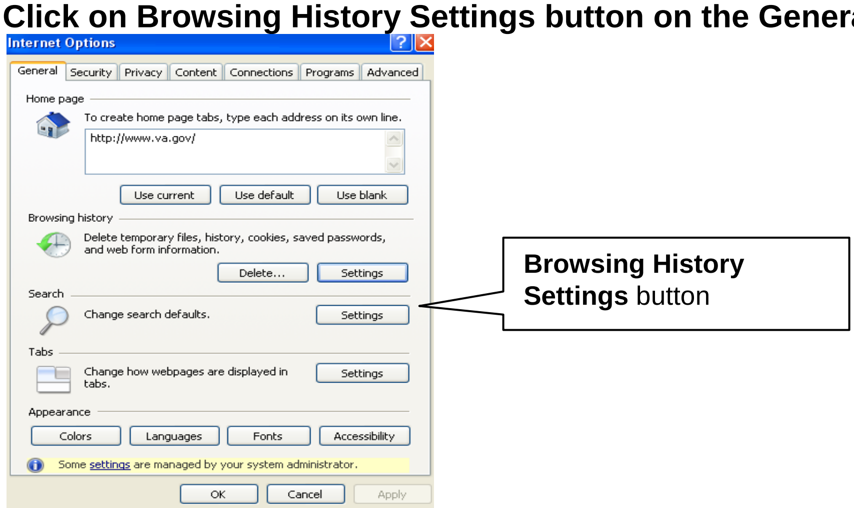
On your Internet Explorer browser, you must have your **Pop-Up blocker turned OFF,** you must have a **screen resolution of 1024X768**, and you must **allow files greater than 1000MB.** See below.

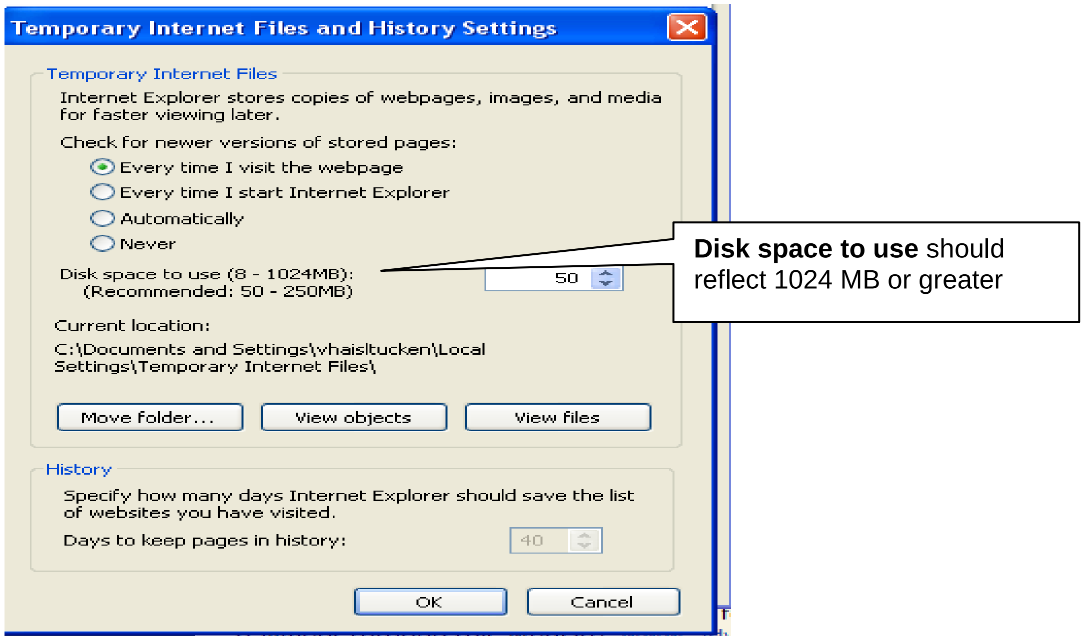
TURN OFF POP-UP BLOCKER



File Size Setting MUST be no less than 1000 MB; to check go to Tools>Internet Options

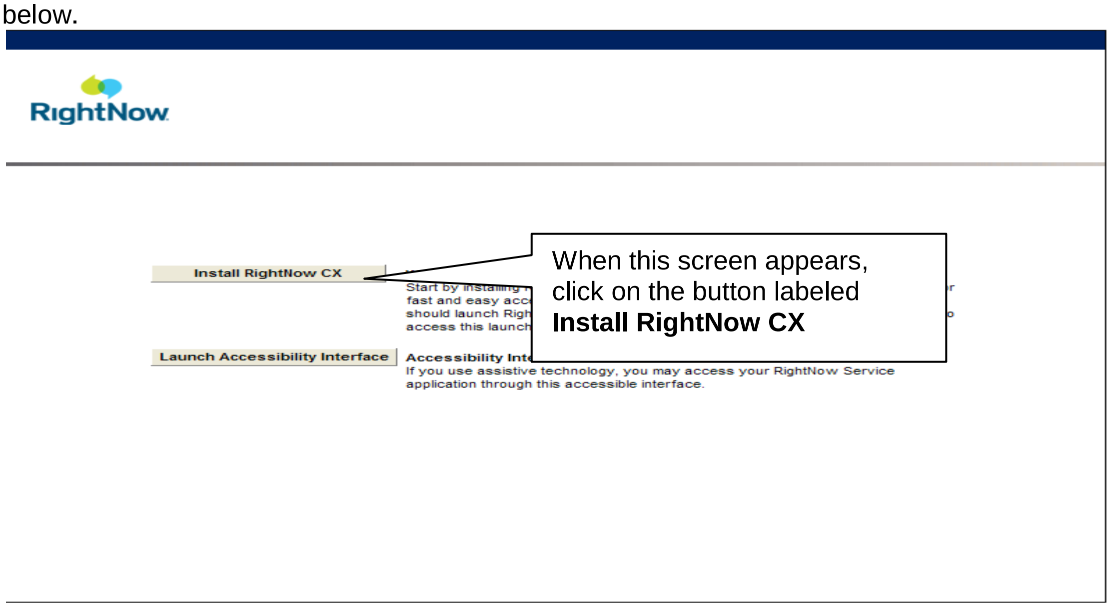
Click on Browsing History Settings button on the General Tab



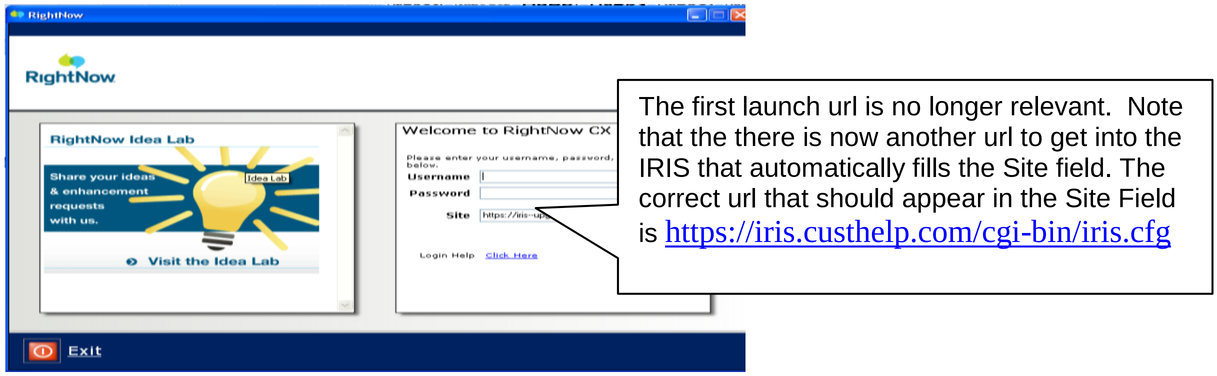


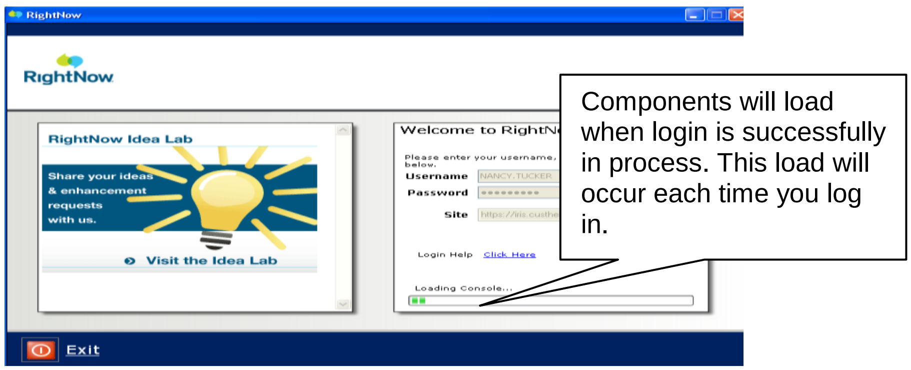
First Launch:. Enter the IRIS logon URL in your Web browser:
https://iris.custhelp.com/cgi-bin/iris.cfg/php/admin/launch.php
(NOTE: you may have to type it in rather than cut and paste to make it work. ALSO NOTE: This url will only be used ONCE. Subsequent logins must be handled by using the Start button. See further instructions on Subsequent Logins below.)

You will begin at the IRIS launch page. Click on the button labeled "**Install RightNow CX**" (standard desktop configuration); do not use Thin Client unless you are sight impaired and require the blind reader version of the IRIS.. Once the launch is exacted, you will get to the login screen. **After the first launch, you will access the IRIS using your Start button.** See **Subsequent logins** section below.



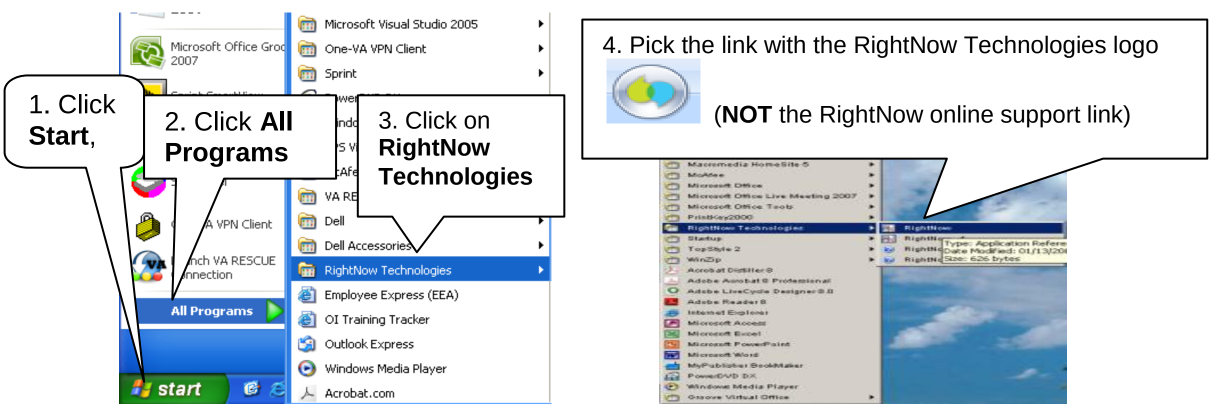
Launch Page



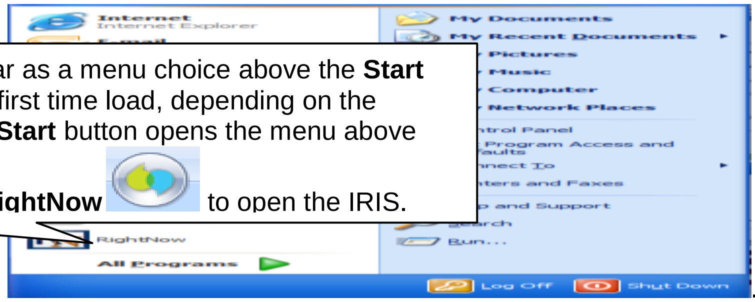


Subsequent Log-Ins: The Windows Start Menu should be used to log into the IRIS after initial launch. See screenshots below.

After you have launched the IRIS successfully for the first time, you should log in using your **Windows Start** menu, since RightNow will now appear as an option on the menu. Components will load every time you log in. See below.



OR



RightNow *may* appear as a menu choice above the **Start** button after the initial first time load, depending on the frequency of its use. **Start** button opens the menu above the button. Click on **RightNow** to open the IRIS.

Minimizing the Browser Screen

It is recommended that you minimize the browser whenever you will be inactive in IRIS during a work day rather than logging off the system. Minimizing prevents the need to reload the temporary files every time you leave IRIS to conduct other activities. If you will be gone from the IRIS for any extended period of time such as at the end of the workday, you should log off the system.

Access Codes

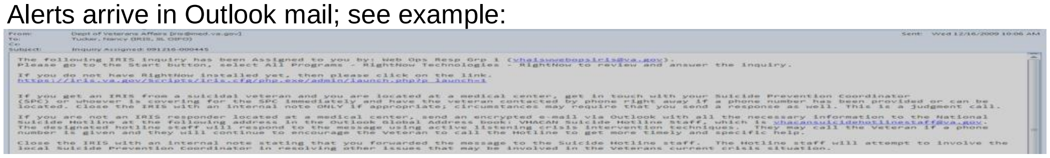
Your access codes consist of **Username** and **Password,** and are ***case sensitive***. These are issued by the IRIS Administrators along with the licenses to use this system. This version does not allow multiple logins using the same access code. Individual access codes must be issued by the IRIS administrators. Once you have a username and password, you may subsequently change your password. DO NOT CHANGE YOUR USERNAME; only IRIS System Admins should do this. See **Personal Settings** section below for instructions for changing passwords.

We do not have unlimited licenses, so please do not request more licenses than you need. If you need more licenses for staff, contact the VA IRIS System Administrators at vairissysadmin@va.gov If anyone using the system ceases to use the IRIS for any reason, please notify the IRIS System Admins so that the license can be re-issued to someone else and their names can be removed from the IRIS Listserv announcements mailgroup and other internal records.

Alerts regarding the Receipt of IRIS Traffic

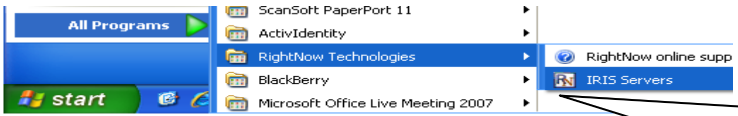
The alerts function must be set by the VA IRIS Systems AND by the responder. The System Admins set your IRIS account to **send** alerts to you/your mailgroup to let you know that you have IRIS traffic. The ability to SEND the alert is controlled by the VA IRIS System Admins. You must also adjust your personal settings to **receive** alerts. See **Personal Settings** section to see how to set this. If you or your mailgroup is set to receive alerts, each separate inquiry will generate an alert message. **Note:** if a distribution group membership is incorrect or if the IRIS server or Exchange servers are having problems, alerts may not be sent. You cannot rely on alerts alone to keep up with IRIS traffic alert. **It is recommended that you log into the IRIS every day to ensure that nothing is left unattended; that is the only guarantee that inquiries will be addressed within required turnaround times.**

Alerts arrive in Outlook mail; see example:



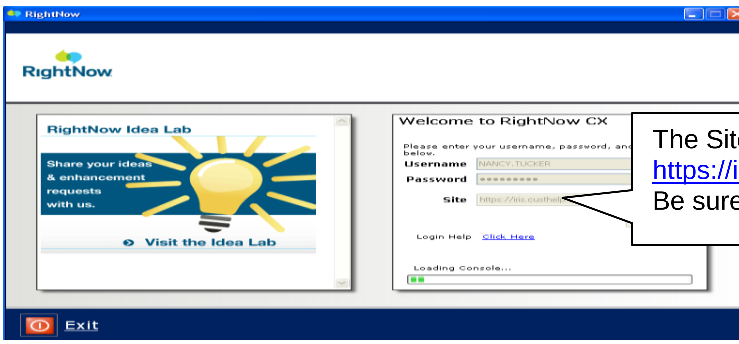
The link embedded in the open message is to be used ONLY when you haven't run IRIS version 8 before. The link is https://iris.custhelp.com/cgi-bin/iris.cfg/php/admin/launch.php
This link will install the software and get you to the log in screen for the first time. **Once installed, do not use this url again.**

If you already have the software installed, go to **Start> All Programs> RightNowTechnologies**, and click the RightNow entry with the RN icon (NOT RightNow online support). This will take you to the log in screen. The **site field** on the login screen should say https://iris.custhelp.com/cgi-bin/iris.cfg (**NOTE**: You cannot access the IRIS by typing this url in the address field of the browser. You MUST use the pathway with Start>All Programs>RightNow Technologies, RightNow to get to the log in screen.) Be sure to enter your access codes with the correct cased sensitivity..



Start – All Programs> - RightNowTechnologies, and click the RightNow entry with the RN icon.

(NOT RightNow online support).

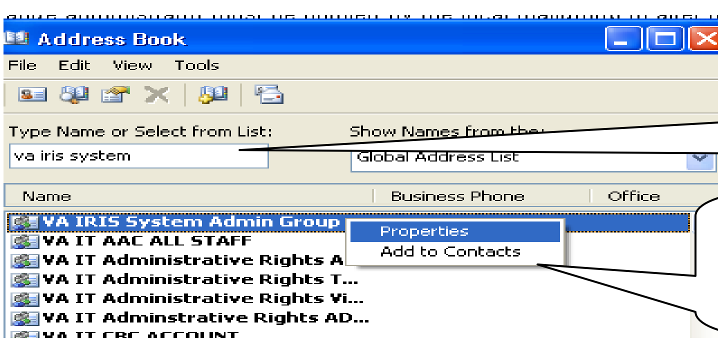


The Site field on the login screen should reflect https://iris.custhelp.com/cgi-bin/iris.cfg
Be sure to enter your access codes in the correct case.

Each mailgroup has a specific e-mail address to which alerts are sent. In some cases, specific individuals are listed in the IRIS as subsets to a mail group, in which case alerts can be sent directly to those individuals. **For an IRIS mail group to get alerts that there is IRIS traffic needing attention, the mail group must have the mail group members listed on the distribution group for the routing address in Outlook Exchange mail.**

The IRIS server passes the alerts to Exchange mail for delivery. Only the Exchange mailbox owner or your local Exchange administrator can modify the distribution list to add or to remove names on the distribution group membership. If membership in an IRIS mail group changes, the IRIS System Admins need to be informed to ensure the integrity of their IRIS memberships and passwords. **In addition,** the local Exchange administrator or mailbox owner must be notified by the local mail group to alter the distribution list; the IRIS System Admins cannot perform this function in Outlook. Below is an example of a distribution group:

The example is the **VA IRIS System Admin Group** listed in the Global Address List in Outlook Exchange. When you locate the routing name, you right click and choose Properties. Then the distribution list appears. The person shown as the owner, if any, should have the ability to click on the Modify Members and make the changes. If no name is shown, your local Exchange administrator will have to be contacted to make changes.

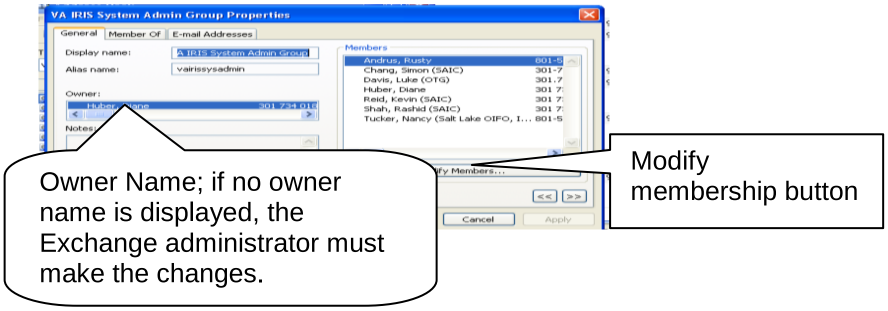


Find routing name in the GAL

Right click on name and choose Properties to display Distribution group

Outlook Mail Address Properties

Distribution Group Membership



Required Turnaround Time for Responses:

The **required turnaround time** for responses is within **5 business days of receipt of the inquiry by VA,** unless another specific policy is mandated by your business line or other line of authority that is LESS than 5 business days. **NOTE:** The turnaround time requirement remains the same even if the inquiry is reassigned. The count begins with the receipt of the inquiry or the veteran update to that inquiry. Veterans are told that the response time is 5 business days, which begins with the date of submission.

Since alert traffic is not always reliable, you must log in manually **no less than every 2-3 days** to ensure that nothing is sitting unattended. Logging in is the only certain way to know what inquiries are in your workspace and to respond to them within required timelines.

Life Cycle of An Inquiry

Inquiries are never closed until they are set to Solved after an action by VA. Inquirers have 31 days from the last action on an inquiry to reopen it and add on more information. If an inquirer continues to update the inquiry, the life cycle of an inquiry can be a very long time. If the inquirer misses the 31 day timeline, s/he has to open a new inquiry.

Inquirers can also cancel an inquiry. There is a button on their acknowledgement messages that says "I no longer need a response to my inquiry". If the inquirer presses this button, the inquiry will automatically be set to Solved and moved to the Solved basket of the mailgroup with jurisdiction.

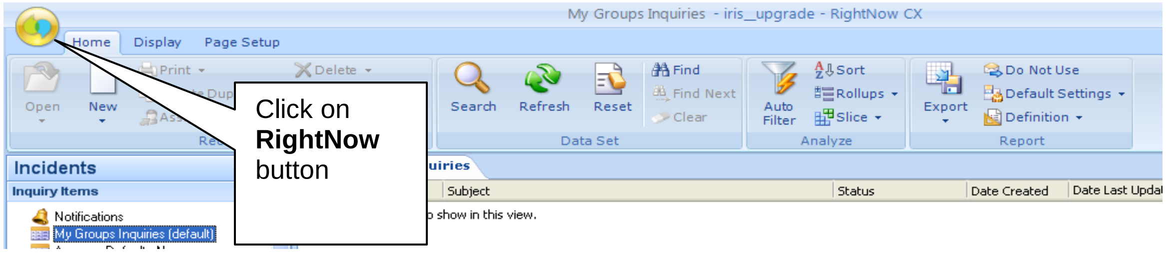
Personal Settings: Receive Alerts, Change Passwords, Change Open Item Tabs Location on your My Group's Inquiries screen:

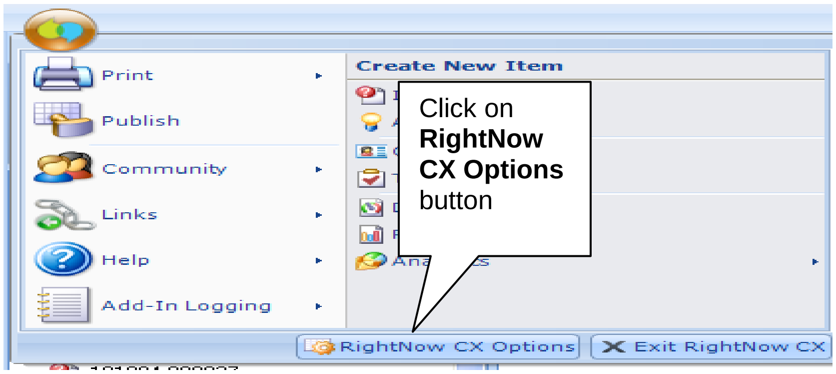
From the My Group's Inquiries Console, you can change your personal settings to:

- **Receive/not receive alerts** telling you that you have IRIS traffic
- **Change Password**
- View Options to **change the location of the tabs** for the open items from the top of the screen (default) to the bottom of the screen.
- Navigation Pane Options (DO NOT USE)
- Add ins (DO NOT USE)

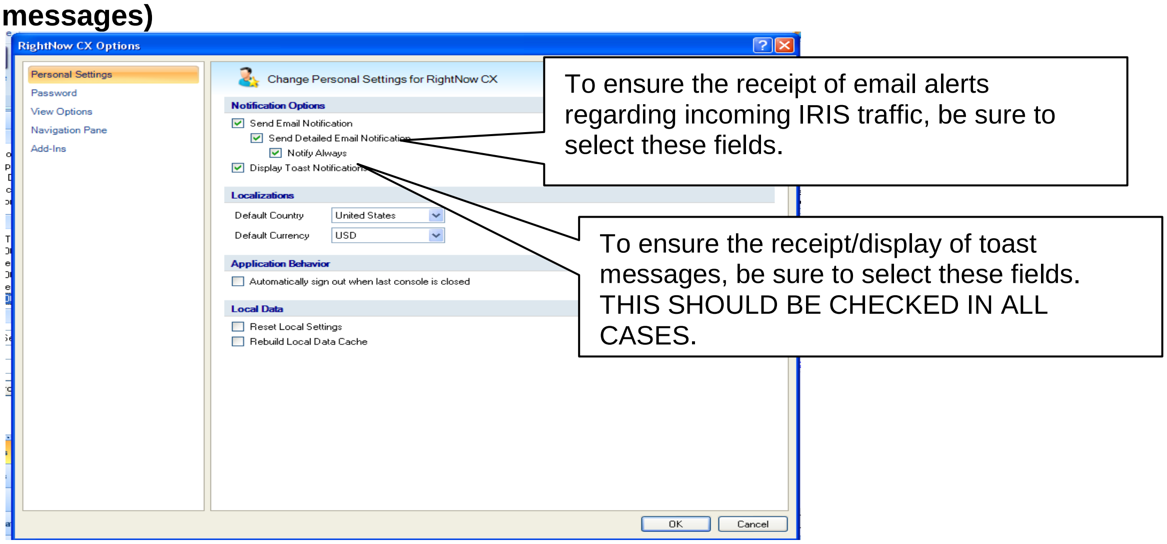
Note: Access depends on level of permissions set by the Administrator. Password changes may be made by the VA user and should match the strong password requirements that require no less than 8 characters long, with a mix of upper and lower case letters, numbers and control characters. DO NOT CHANGE YOUR USERNAME; this should be done by the VA IRIS System Administrators.

To make changes:



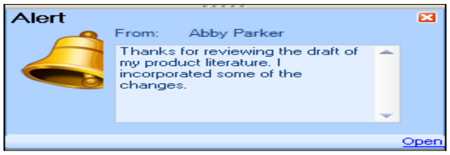


To change Personal Settings (receive alerts of incoming IRIS traffic and toast messages)



Toast Notifications; pop-up messages/announcements that appear on your screen
Announcements internal to the IRIS that may be sent to specific IRIS groups or individuals are called “toast” notifications; these messages apply **ONLY** to the IRIS system and *are not related in any way to regular Outlook email.* **Only designated persons and system administrators** have permission to **send** messages using this feature; however, **everyone** is able to **receive** them.

Toast messages appear as **pop-ups that will display briefly** on the staff members’ desktops **when they are logged into the IRIS;** no external alert messages are issued. The message is displayed in a window on the lower right section of the display for several seconds until it fades away. These notifications also appear in your list when you double-click **Notifications** on the navigation pane, and they remain in your list until you delete them.



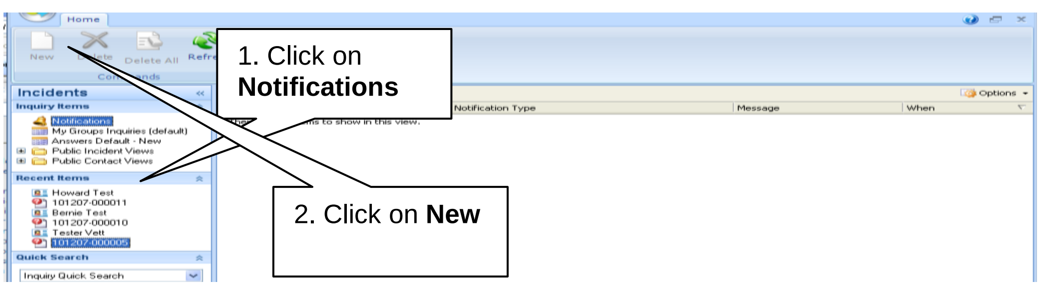
If you have been sent a notification while you are logged in, the desktop alert appears when the Notifications list is automatically refreshed. The default refresh interval is fifteen minutes, but your administrator may have changed that interval. Alerts also appear if new notifications are available when you manually refresh the list.

Sending Toast Notifications (requires specific permissions)

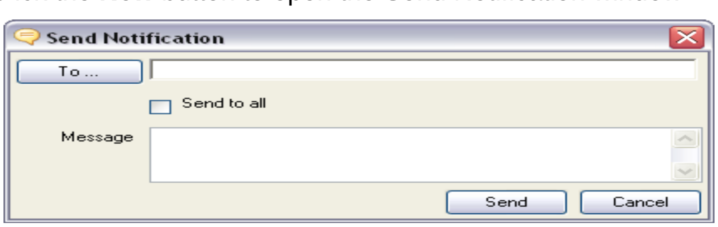
You **must** have the appropriate privileges to be able to send toast messages**.** When you broadcast a toast notification to other IRIS users, they will receive that notification only on their open IRIS screens *when they are logged in;* messages appear as temporary pop-ups. If a toast notification is sent to an individual user who is not logged into IRIS, the user will receive the toast message when they log in. **HOWEVER, toast messages sent to ALL IRIS users in the system will only be received by users logged into the IRIS at the time the message is sent. Only the IRIS System Administrators should send Toast Notifications to ALL IRIS users.** Your profile may give you permission to send notifications to other staff members. If so, you can select the recipients manually or send a toast notification to all logged-in staff members.

To send a broadcast notification

1. Double-click Notifications on the navigation pane.

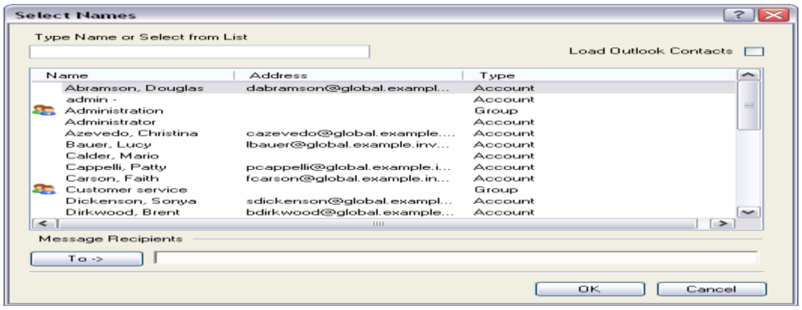


2. Click the **New** button to open the Send Notification window.



3. To send a notification to all staff members in the IRIS system who are logged in, select **Send To All** (*only system administrators should do this. All others should select a specific person or persons*.)

4. To send to selected staff members, click the **To** button to open the Select Names window.



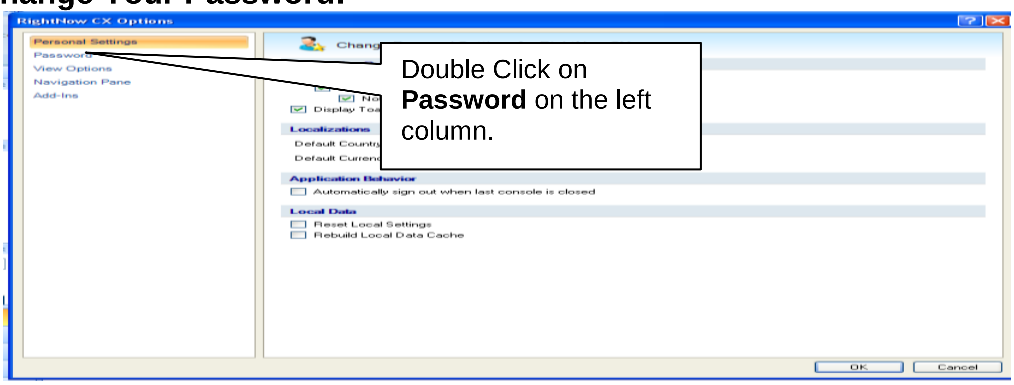
a. Select one or more names from the list. To select multiple recipients, press **Ctrl** while making your selections.

b. Click the **To** button to add the names to the field. Click the **OK** button to close the Select Names window. The names you selected appear in the To field of the Send Notification window. Note: You can also type the first few letters of the name you want to send the notification to in the To field of the Send Notification window. If only one staff member's name begins with those letters, the field is automatically populated when you move to the Message field. If multiple staff members' names begin with the same letters, you can select the one you want from the Check Names window that opens when you move to the Message field.

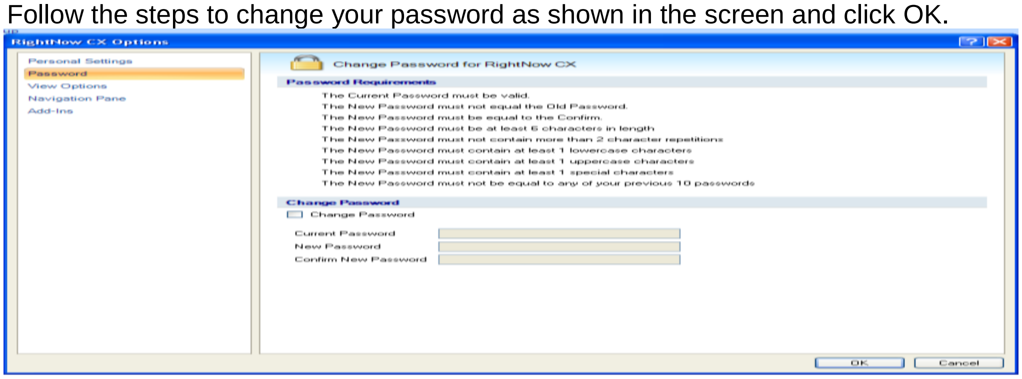
c. Type your message in the **Message** field of the Send Notification window.

d. Click the **Send** button to the message.

Change Your Password:

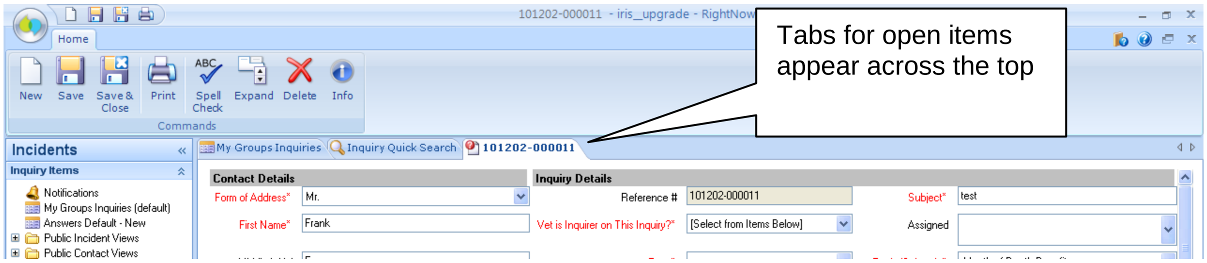


Follow the steps to change your password as shown in the screen and click OK.

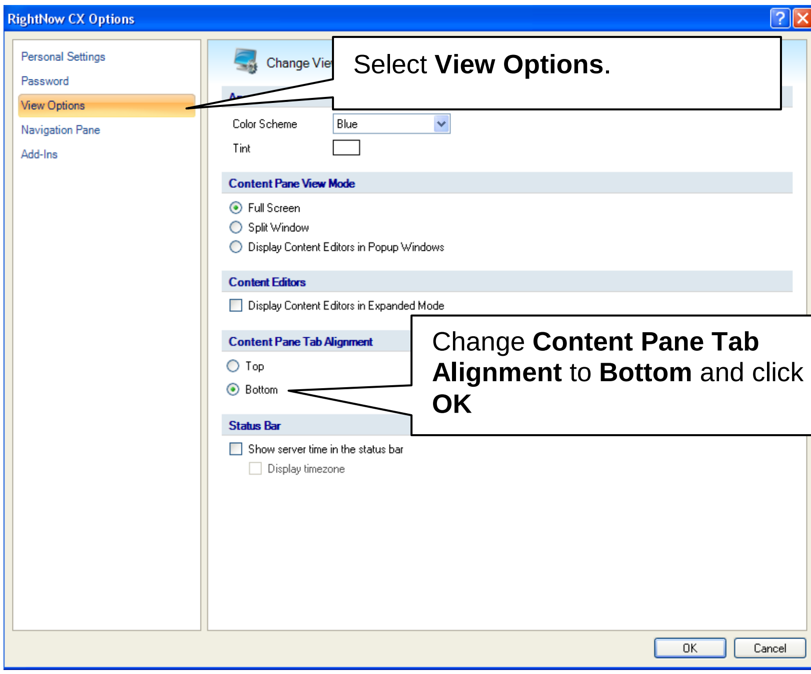


Change Location of Open Item Tabs that appear as you open items on your screen.

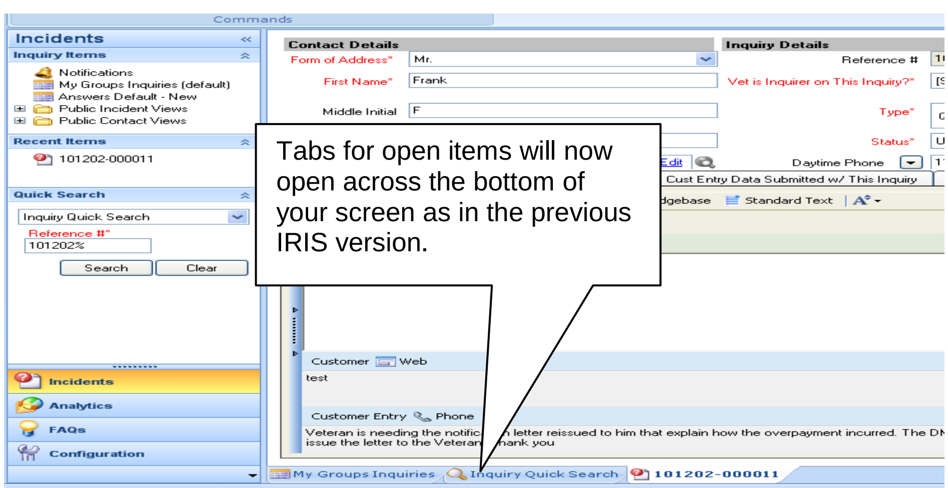
Default setting: The tabs for items that are opened appear horizontally across the top of the **My Group's Inquiries** screen:



To change the tab display for items opened on your screen to the bottom as they were in the prior IRIS version:



The tabs will now appear across the bottom unless you change the default back to its original setting.



The Inquiry Console Screen: My Group's Inquiries Home Screen

The Inquiry Console Home Screen Definitions and Terms

The Inquiry Console is your point of access to all inquiries, and to the Answer/FAQ Knowledge Base. All customer inquiry requests are serviced from the Inquiry. This console provides the means for:

- Searching for inquiries.
- Editing inquiries to work on and solve inquiries.
- Sending responses— including the procedure to send a file with a response.
- Updating multiple inquiries, which is a feature you can use to take an identical action on more than one inquiry, such as closing out duplicate inquiries from the same inquirer.
- Adding inquiries on behalf of veterans.
- Getting to the Analytics/Reports feature if you have permission to use it.

Key terms

As you work with inquiries, you will want to become familiar with the following key terms.

Console—A major window/screen display in the IRIS application.
Contact—A contact is a person. A person who submits an inquiry is an inquirer and also a contact. If the inquirer is not the veteran but inquires about a veteran, the veteran is also a contact. Under this circumstance, a single inquiry may have two contacts: the inquirer and the veteran. If an inquiry concerns the representative of the dependent of a veteran, there will be three contacts: one for the inquirer, one for the veteran, and one for the dependent. The **contact record** is the place where the definitive information about the person/contact is stored, and this is the place that contains the searchable PII fields for the contact. Any inquiries from or about this person will show in the inquiry history for this contact record.
Default response requirements—The maximum time allowed (in hours) for inquiry response and resolution within the operating hours defined by the organization. The default response requirements are used to measure responder performance in responding to and solving inquiries. The parameter set in the IRIS for acceptable response time is 5 business days. If this threshold is exceeded, the inquiry listing will turn red on the Inquiry Console.
Discussion thread—The list of all activity on an inquiry, including updates made by the inquirer, responses entered and/or sent by responders, and notes about the inquiry made by responders (never visible to veterans and other IRIS customers). All activity is listed chronologically and provides a history of each inquiry in the IRIS.
Drill down—To start at a top or general level and become more specific at each lower level. The IRIS drill-down feature enables access to additional levels of detail on consoles, views, and reports.
File attachment—A file that is attached to an inquiry by VA; NOTE: inquirers are not permitted to append files or documents to their inquiries for security reasons. Files that are attached to an inquiry response by VA can be accessed by veterans and other IRIS customers by viewing the answer on their e-mail clients.
Inbox—A mail group repository for IRIS inquiries. The inbox contains all inquiries that have been assigned to the responder/responder group.
Inquirer—A person/contact who accesses the IRIS to submit an inquiry via the web or any person who submits an inquiry to the IRIS via a call center, walk in visit, etc.
Inquiry—Any question or request for help from a veteran or other VA Website customer through the Ask a Question feature on the IRIS homepage. Inquiries can also be added by responders on behalf of veterans on the Inquiry Console (most typically a feature used by a call center).
Important Notes:

- All status codes can be reset manually to another status code.
- **The IRIS statistically counts any inquiries with a status code other than Solved as an open inquiry**. Only inquiries that are in Solved status are considered completed and closed out.

Multi-edit—A feature on a number of consoles for updating more than one inquiry at a time.
Security profile—the level of access assigned to you by the IRIS System Administrators for you based on your skill set. Your inquiry console screen will display features to which you have access based on your security profile.
SmartAssistant—An IRIS feature that searches the FAQ Knowledge Base to match keywords and phrases to existing FAQs and provides any of those FAQs to IRIS customers and IRIS staff as possible answers to inquiries..
Solved—An inquiry status that is used when an inquiry has been answered and closed.
Standard Text (Also called *standard response)* —Any text or response prepared in advance that can be sent to veterans and other IRIS customers when responding to IRIS inquiries. This text can be

appended to responses manually by a responder by selecting a prepared response from the Standard Text dropdown menu. This answer can be amended by the responder to fit the needs of the response...

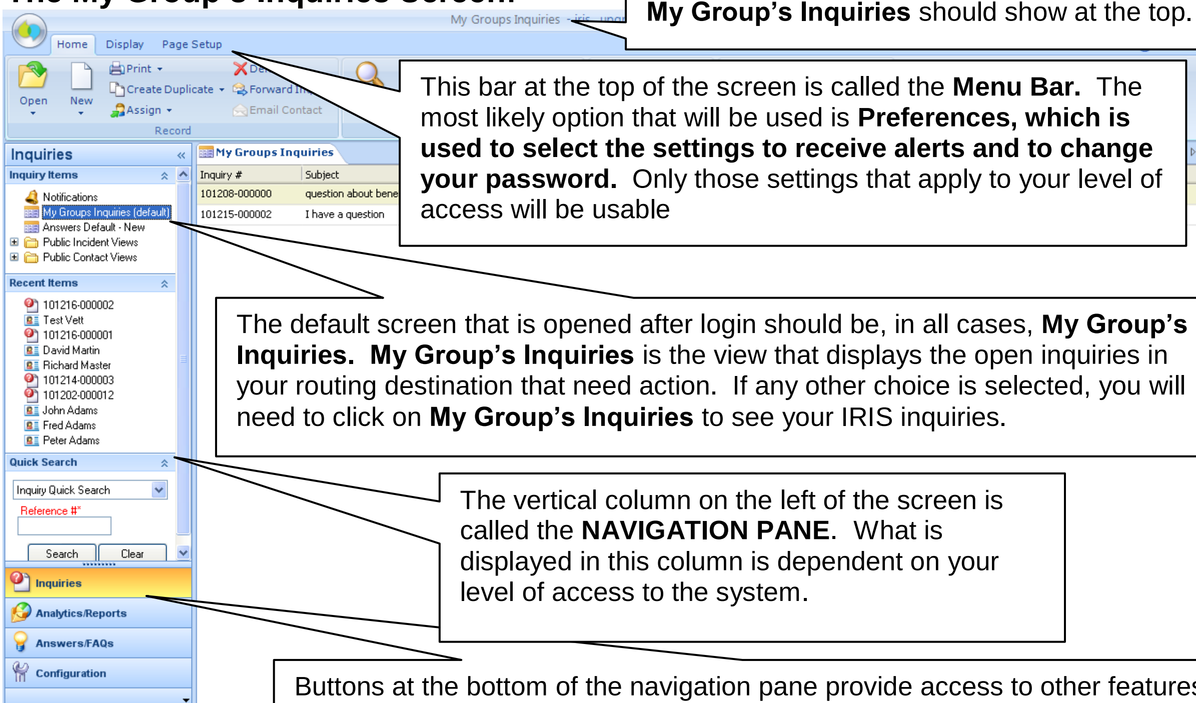
Unresolved—An inquiry status type that automatically is assigned to a newly submitted inquiry.

Updated—An inquiry status code that indicates that an inquiry has been updated by the veteran.

My Group's Inquiries: the screen default after you log in

When you log in, you automatically go to your profile default screen from which you initiate all activities. In all cases, your profile default screen should be **My Group's Inquiries.** This workspace will show all the inquiries that belong to your mailgroup.

The My Group's Inquiries Screen:



My Group's Inquiries should show at the top.

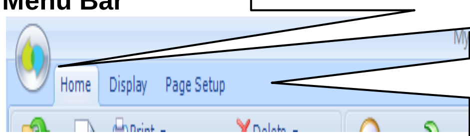
This bar at the top of the screen is called the **Menu Bar.** The most likely option that will be used is **Preferences, which is used to select the settings to receive alerts and to change your password.** Only those settings that apply to your level of access will be usable

The default screen that is opened after login should be, in all cases, **My Group's Inquiries.** **My Group's Inquiries** is the view that displays the open inquiries in your routing destination that need action. If any other choice is selected, you will need to click on **My Group's Inquiries** to see your IRIS inquiries.

The vertical column on the left of the screen is called the **NAVIGATION PANE**. What is displayed in this column is dependent on your level of access to the system.

Buttons at the bottom of the navigation pane provide access to other features, depending upon your level of access. In this instance, you can click on Analytics/Reports or on Answers (FAQs). The default should be **Inquiries**.

Menu Bar



This is the **RightNow icon** button; use this to change your **Personal Settings**.

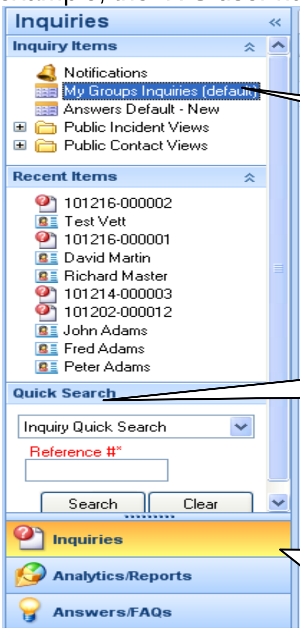
This bar at the top of the screen is called the **Menu Bar.** The default tab is **Home**. The tabs for **Display** and **Page Setup** are available only to those users with **Reports** access; otherwise they are grayed out.

Navigation Pane: Left Side Column

Items listed in the navigation pane will depend upon your level of access to the IRIS. All levels of access to the IRIS should show **My Group's Inquiries** as the default. The other items shown in the **Inquiry Items** section are other views; do not use them unless instructed to do so.

Tabs will display across the top of the screen (or on the bottom if you choose to change the location via the Personal Settings) as you open different screens. The

Recent Items comes next; this section shows the ten items you accessed most recently. When you move on to something else, the new item will appear at the top and the oldest will be removed from the bottom of the list.
Quick Search comes next; this section allows you to search for a particular inquiry or a particular contact.
Buttons displayed at the bottom of the navigation pane depend on your level of access. In this example, the IRIS user has access to Inquiries, Analytics/Reports and Answers (FAQs).

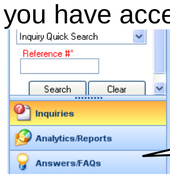


All levels of access to the IRIS, except for Reports Only access should show **My Group's Inquiries** as the default. Other items listed will depend on your level of access.

Everyone with access to inquiries has the **Quick Search** capability to find an inquiry or a, contact. Use the dropdown arrow to select **Contacts Quick Search** or **Inquiry Search.**

Items shown at the **bottom** are the horizontal buttons for the features/capabilities that are available to your user profile. When you select a feature using a button on the bottom of the nav pane, your choices for that selection will be displayed at the **top** of the navigation pane. See next screen shot.

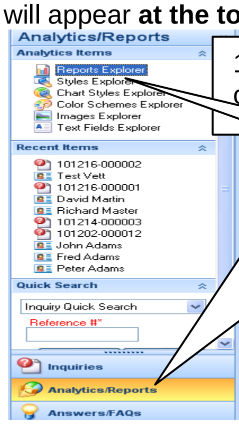
Buttons at the bottom of the Navigation Pane allow access to other features/functions for which you have access permission; everyone has the button for **Answers/FAQs**.



The buttons on the bottom depend on your level of access. Everyone has access to the **Answers/FAQs**.

Navigating to another function

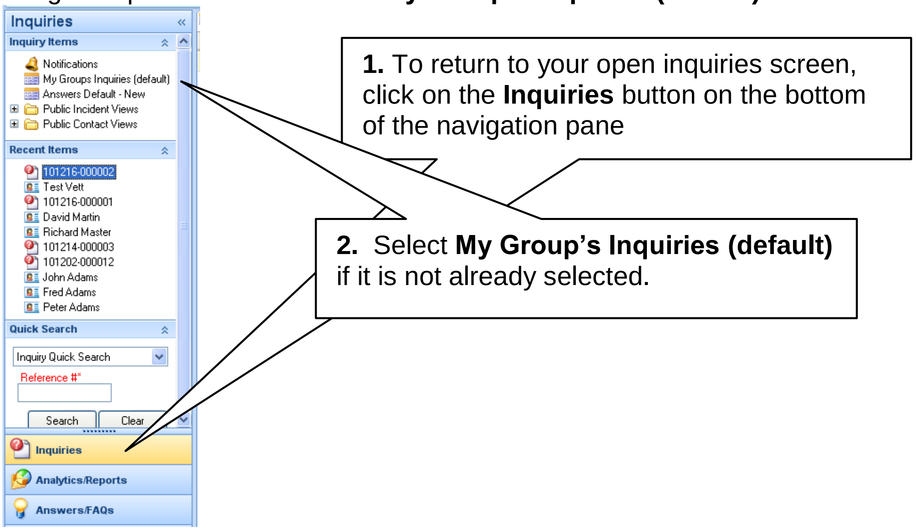
Selecting another item may change other items on the navigation pane. For example, if you want to navigate to **Analytics/Reports,** click on that horizontal button on the bottom left and different choices will appear **at the top** of the column.



1. If you have access to the Reports function, click on **Analytics/Reports** button.

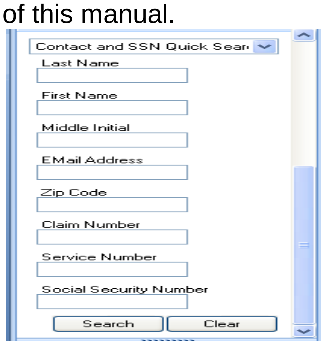
2. Explorers section will appear at the top of the column. Click on **Reports Explorer** to get to the Reports capability.

To return to your open inquiries screen, click on the **Inquiries** button on the bottom of the navigation pane and then select **My Group's Inquiries (default)** if it is not already selected.

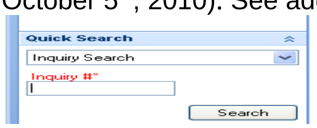


Quick Search Options: Search by Contact & SSN or by Inquiry Number

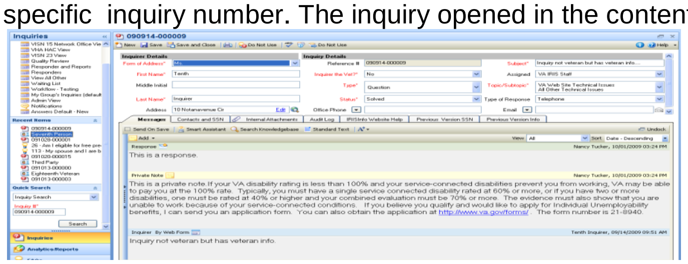
When **Contact & SSN Quick Search** is chosen, you can do a search using **Last Name, First Name, Middle Initial, E-mail Address, Claim Number, Service Number** and/or **SSN.** You can search using any of those fields alone or in combination. You can also use a wildcard search, which is the percent sign % replacing part of the search string (for example, %223 in the claim number field would look for all claim numbers ending in 223). See additional information in the Wildcard Search section of this manual.



When **Inquiry Search** is chosen as the search method, the search display will change and the **Inquiry #** field will show. You MUST enter the entire inquiry number **or** use the wildcard percent sign (%) to search for a partial string (for example, 101005% would look for all inquiries that came in on October 5th, 2010). See additional information in the Wildcard Search section of this manual.



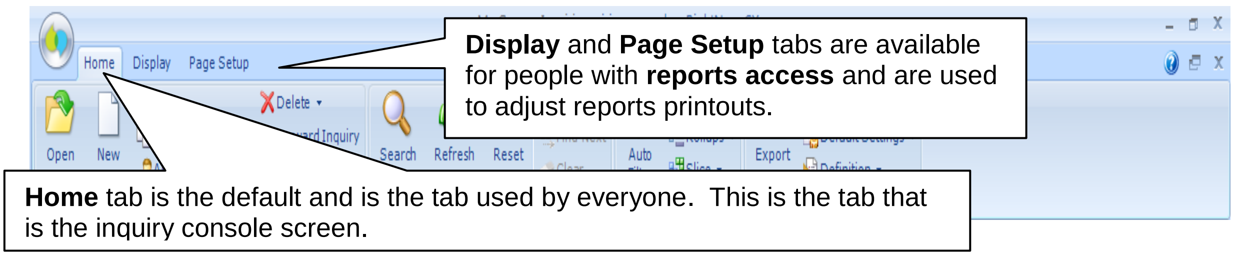
Search Results will display in the content pane. In this example, a search was conducted using a specific inquiry number. The inquiry opened in the content pane.



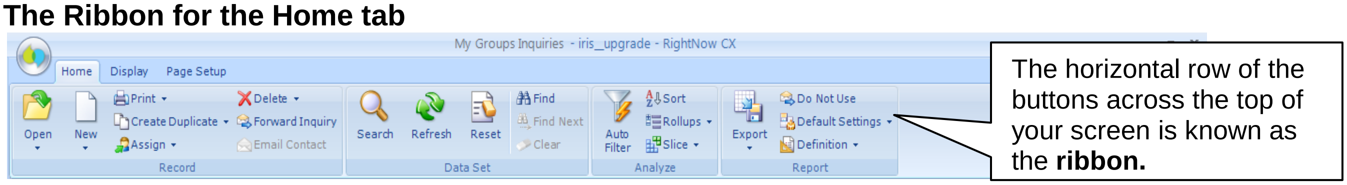
My Group's Inquiries Home Console Workspace Tabs and Buttons

Upper Screen Tabs: Tabs on the upper screen are **Home**, **Report, Display** and **Data:**

- **Home** tab is the default and is the tab used by everyone. This is the tab that is the inquiry console screen. It should always display the **My Group's Inquiries** console screen.
- **Report** tab will only be used by IRIS staff with **Analytics/Reports** capability
  Do not use the Display or Data tabs.
- **The Ribbon**: The horizontal row of buttons is known as the **ribbon;** the buttons are for functions that IRIS users will utilize all the time and include **New, Open, Create Duplicate, Print, Assign, Search, Refresh** and **Reset.**



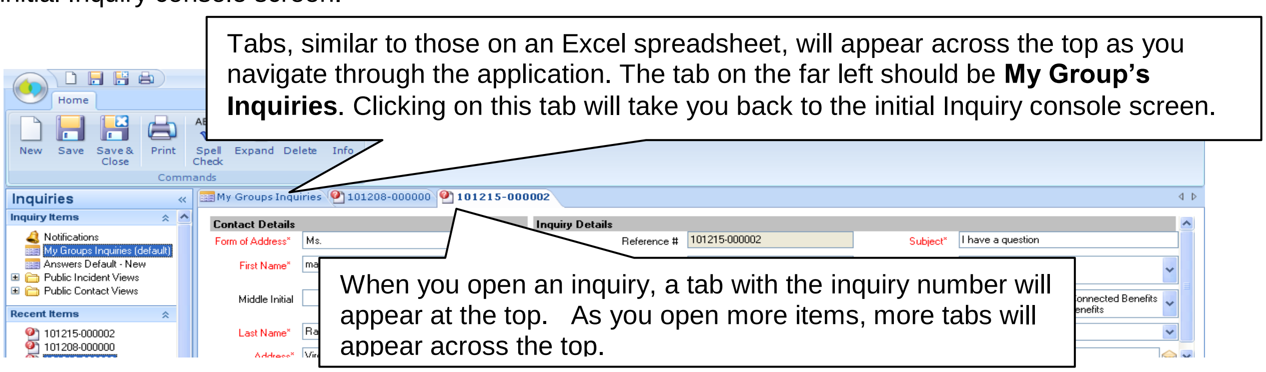
The Ribbon for the Home tab



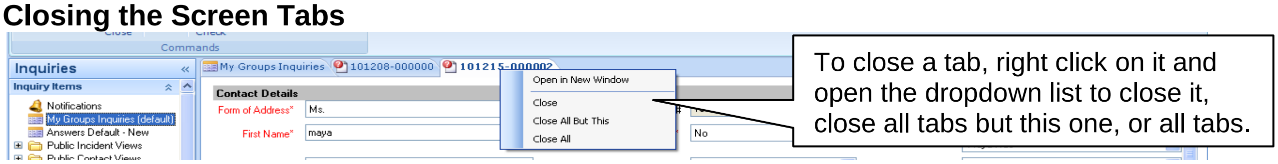
Top (or Bottom) Screen Tabs: tabs will appear as you open inquiries, screens, or contact records. The default is to open across the top; *you can change to the bottom if you choose in the Personal Settings options.*

Tabs, similar to those on an Excel spreadsheet, will appear across the top as you navigate through the application. As you open more items, more tabs will appear across the top, when you open an inquiry, a tab with that specific inquiry number will appear at the top.

The tab on the far left should be **My Group's Inquiries**. Clicking on this tab will take you back to the initial Inquiry console screen.



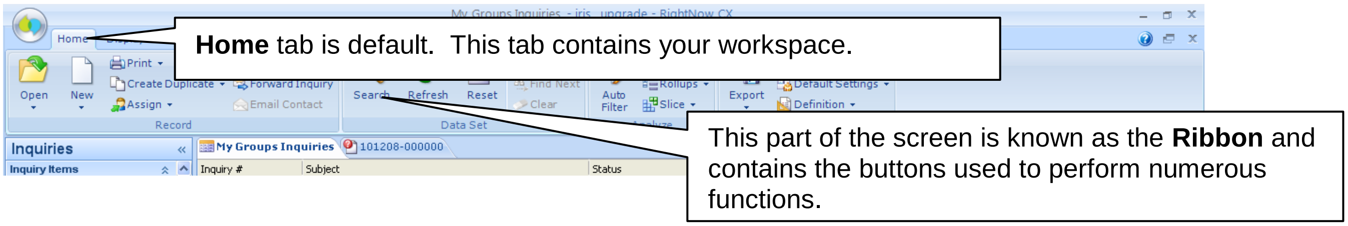
Closing the Screen Tabs



To close a tab, right click on it and open the dropdown list to: close that specific tab, close all other tabs but the selected tab, or close all tabs.

Ribbon Buttons and Their Functions

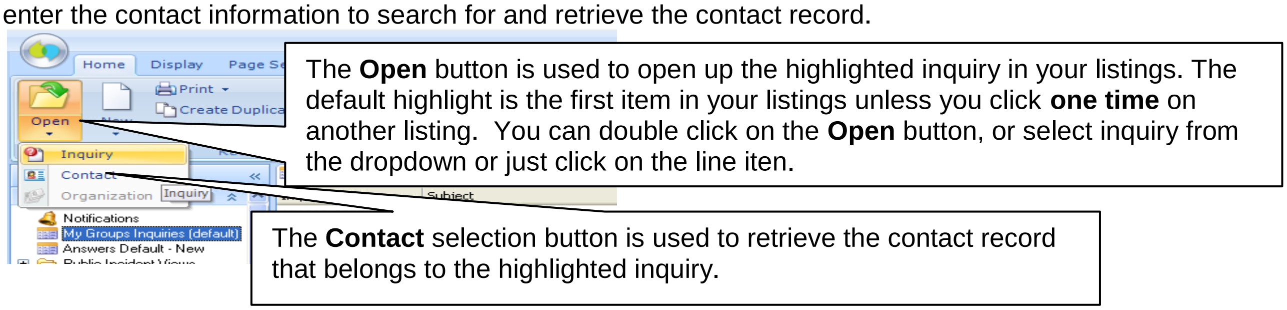
The ribbon runs across the top of the display on the **Home** tab and has buttons that permit particular activities to occur when using the **My Group's Inquiries** screen. Each button is discussed below.



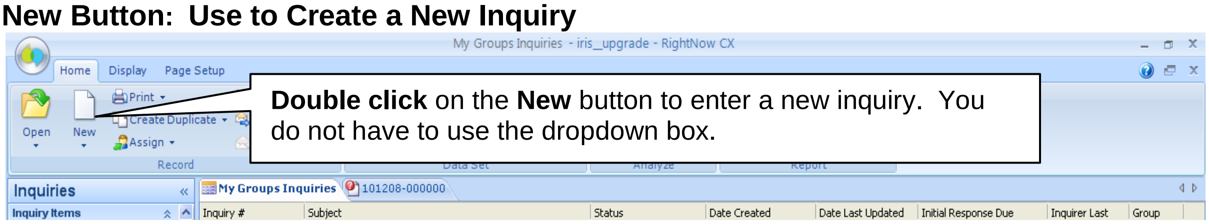
Open Button: Use to Open an inquiry or the Contact Record that belongs to the highlighted inquiry in your inquiries list

Double click on the **Open** button to open the inquiry highlighted in your open inquiry list; the top item is the default highlighted inquiry. **You can also double click on the line item itself to open the inquiry.**

Open Button: To open a contact record, select contact record from the button's dropdown and enter the contact information to search for and retrieve the contact record.

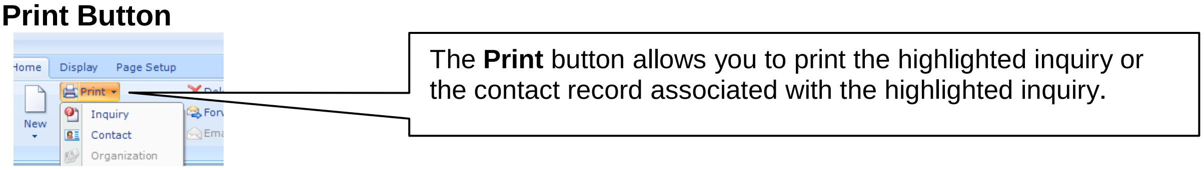


New Button: Use to Create a New Inquiry

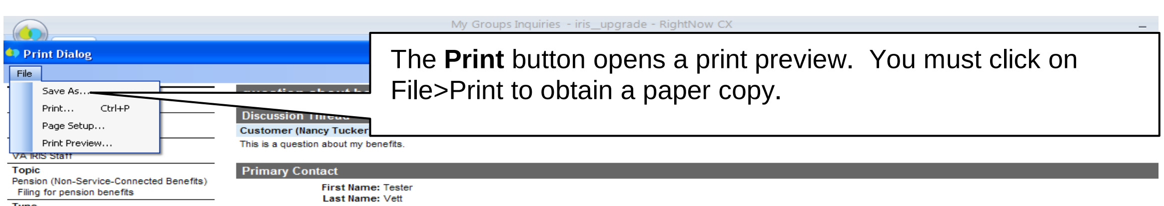


.

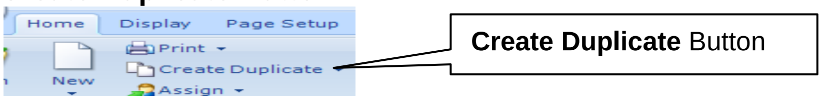
Print Button



The Print function will print the information currently saved. You first see a print preview of the inquiry and must click on File>Print to actually get a paper copy. Paper copies may not display all the PII fields if those fields were not completed. For example, if no Service Number was entered in the Service Number field, that field will not display on the print out at all.

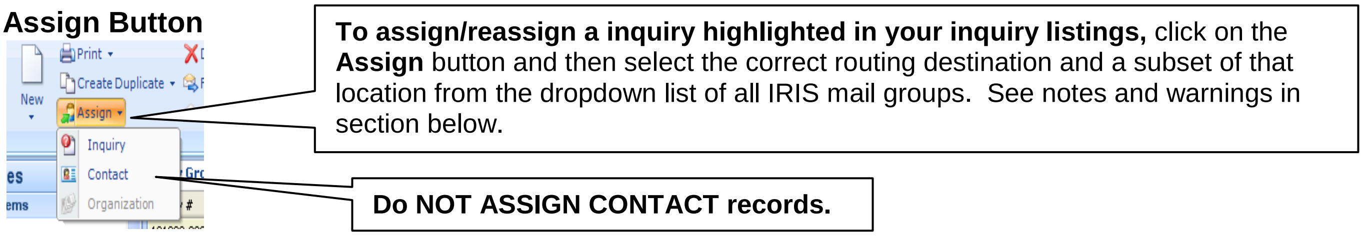


Create Duplicate Button

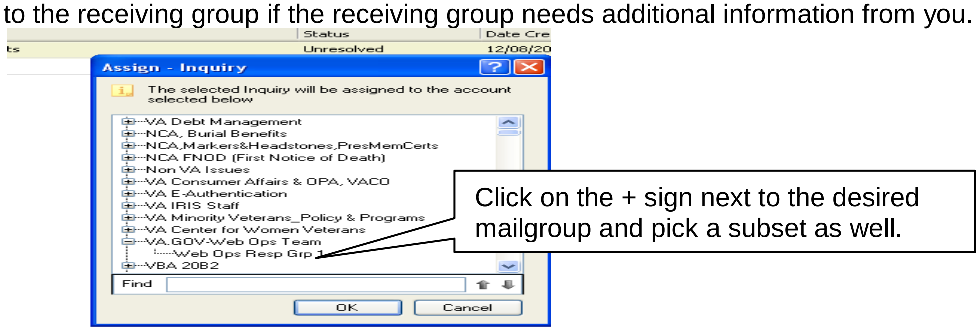


Create Duplicate button creates a duplicate copy of an **existing inquiry that is highlighted in the inquiry listings**, giving the duplicate a new number and allowing additional input and/or allowing that duplicate to be routed to another mailgroup for response. This function is used when a single inquiry concerns multiple issues and more than one mailgroup is needed to resolve each issue. See manual section describing this process and when it is used. **Note:** Do **NOT** create duplicate **contact records**. If you do by mistake, contact the VA IRIS System Admins to correct it immediately.

Assign Button



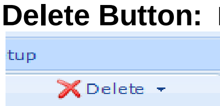
Assign button is used to assign/reassign *a highlighted but not opened inquiry.* Click on the **Assign** button and then select the correct routing destination from the dropdown list of all IRIS mail groups. **Also pick a subset of that mailgroup**. The mailgroups appear in alphabetical order, with all NCA groups with “NCA”, VA groups starting with “VA”, VBA with “VBA”, VHA with “VHA”, etc. To reassign, select the correct mailgroup and its subset and then **Save** to move it. Find the subset by clicking on the + sign to the left of the mailgroup name to open up the subsets. **Note:** You may need to open the inquiry to add a **Private Note** before you reassign it to provide any necessary information to the receiving group if the receiving group needs additional information from you.



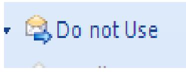
Warnings:
1. *Do **NOT** reassign inquiries to Call Center mail groups.* They do not receive inquires for response; their traffic is outbound only for assignment to mail groups who are designated as responder groups.
2. Do **NOT** ever re-assign an inquiry in **Solved** status.

If you are not sure what group has jurisdiction (issue, geographic location, etc., please utilize the **IRIS Participants Dropdown Listings** document. When an inquiry is open, click on the IRISInfo Website Help tab; it will link directly to the instruction guides. Mailgroups are listed in alphabetic order, service area information, etc. You can easily access all IRIS background documents by using the IRISInfo tab on the console screen when you open an inquiry. When you open the document, use Control+F function and put your cursor somewhere in the text of the document (not a call out box), and enter your search term and find it.

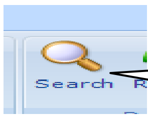
Delete Button: NOT available to the field.



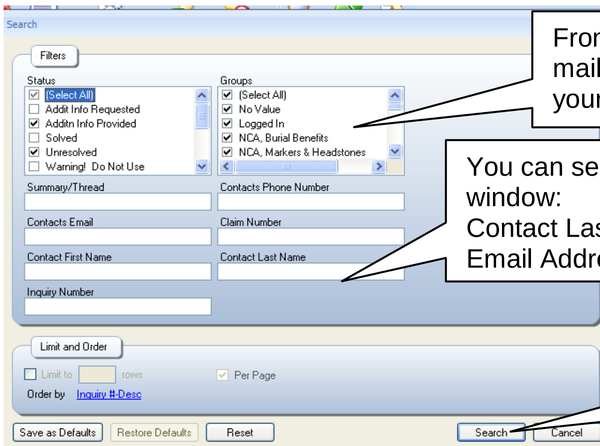
Delete button *is not available to the field*. Contacts and inquiries can only be deleted by the IRIS System Administrators.

DO NOT USE: 

Search button: search using selectable parameters. **Search** allows you to search the IRIS database by using the same or more search parameters than the **Quick Search** function which only allows searches using contact name or inquiry number. Full search allows you to search using claim numbers, phone numbers, etc. You can search only your own mailgroup's items, selected mailgroups' items, or the whole system.



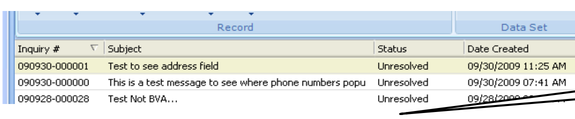
Search the IRIS database, using more parameters than **Quick Search**, such as claim number, inquirer last name, veteran last name, phone number to find inquiries.



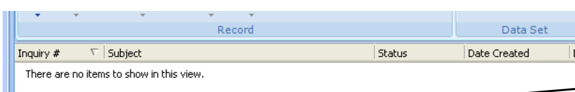
From **Groups** box, you can select what mailgroups to search. **Logged In** refers to your own mailgroup.

You can search using any one of the fillable fields on the Search window:
Contact Last Name, Contact First Name, Phone Number
Email Address, Claim Number, Inquiry Number

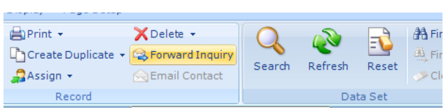
Once you have filled in the search parameter, click **Search**



Search results, if any, will manifest on your screen as line items.



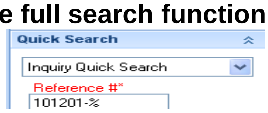
If there are no results, there will be a message saying "There are no items to show in this view."



Click the **Reset** button to restore your original screen.

Wildcard Searches: Using % and * Symbols

% Search: using either the full search function  **or**

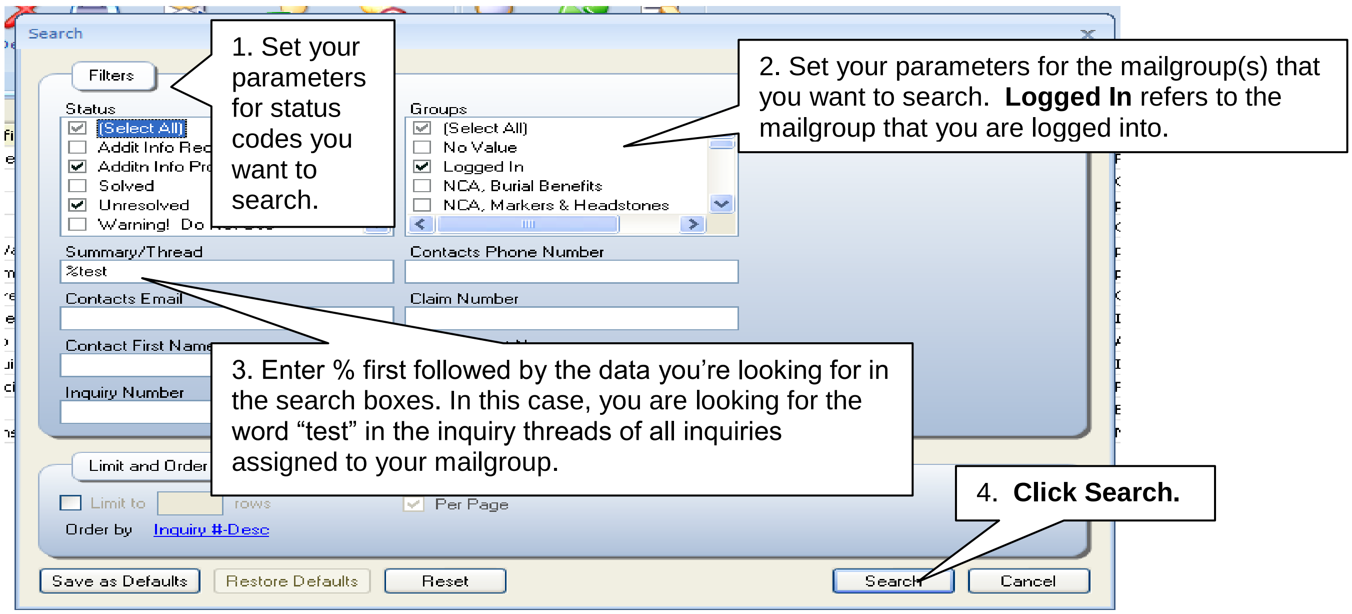
the Quick Search function 

You can search for an inquiry with only a partial name, partial claim number, partial summary string, etc. by using the percent (**%)** character in the search field in either the main search function or in the Quick Search function. Once you have clicked on the **Search** button, do the following: The steps are:

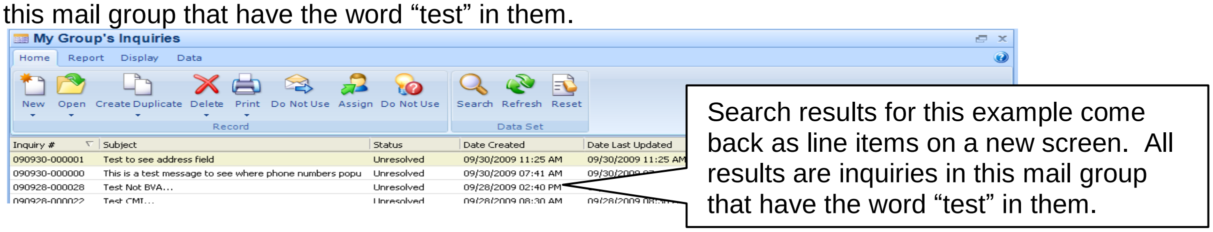
1. **Set** the parameters for **status** codes that you want to search (Solved only, All Status Codes, etc.)
2. **Set** your parameters for the **mailgroup(s)** that you want to search. **Logged In refers to the mailgroup that you are logged into.**

3. **Select** the search field you want to use, fill the search field with the search string preceded by the **%** sign. For example, if you want to find all the inquiries with the word “test”, you would enter %test in the Summary field or you can search using the % at the end of the string. For example, you could enter in the Last Name field Smith% so that you will get a return of every contact record where the last name begins with Smith. See screen shots below.
4. **Click Search.**

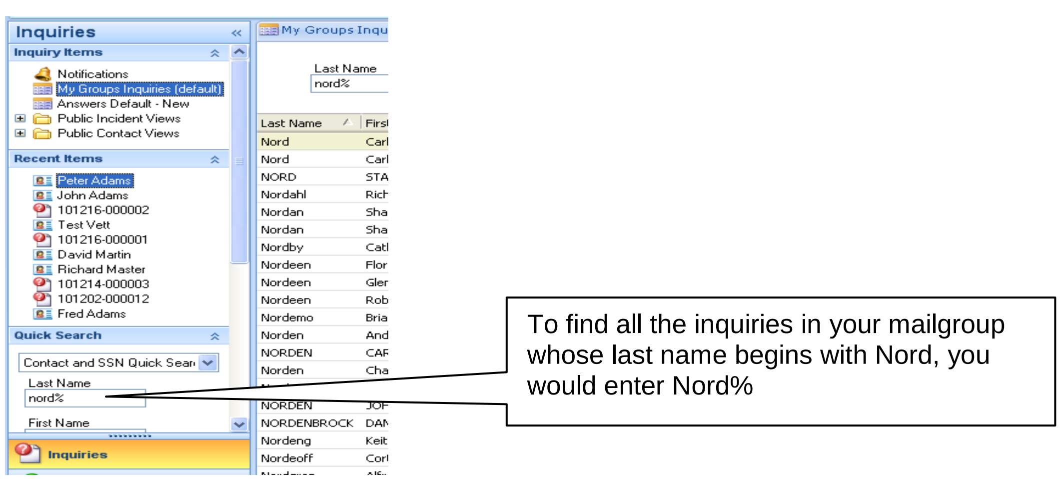
To find all the inquiries in your mailgroup with the word “test” in the subject line using the full search function, you would do this:



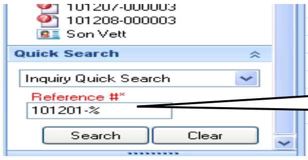
Search results for this example come back as line items on a new screen. All results are inquiries in this mail group that have the word “test” in them.



To find all the inquiries in your mailgroup whose last name begins with Nord using the Quick Search function, you would enter Nord%:



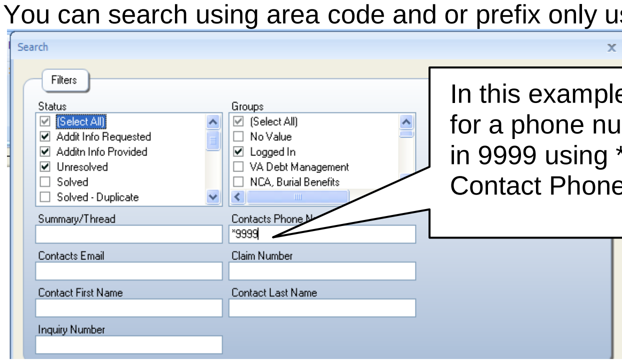
To find all the inquiries that your mailgroup received on a given date, you would enter the date into the inquiry number field in Quick Search, i.e. 101201% to find everything in the system dated October 11, 2010.



To find all the inquiries in your mailgroup on a given date, you would enter the date followed by % (xxxxxx%).

* Search (Star/Asterisk) Search for Phone Numbers

You can conduct a search for an inquiry or contact record using phone numbers by using partial number strings with the star/asterisk symbol rather than the entire phone number.
If you want to find a record using the last four digits of a phone number, you can enter *xxxx..
You can search using area code and or prefix only using xxx* or xxxxxx*.

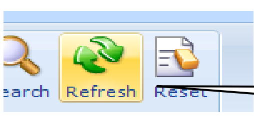


In this example, the search is for a phone number that ends in 9999 using *9999 in the Contact Phone Number field.

Any results will be listed as line items on the search return.

Refresh button

When you are done with the **Search** function, **Refresh** will update your screen with any new inquiries that have come in since the home screen was last viewed.

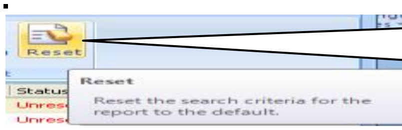


Refresh will update your screen with any new inquiries that have come in since the screen was opened.

Reset button

Reset allows you to return to the **Search** default screen after you have completed a search for which you changed the default parameters.

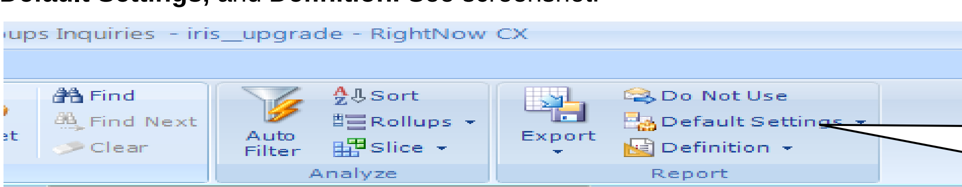
.



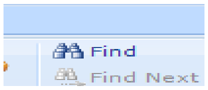
Reset allows you to return to the **Search** default after you have completed a search for which you changed the default parameters.

Reports buttons on the Right End of the Ribbon

Only IRIS users with Reports access will have access to the buttons on the right end of the ribbon. All of these buttons are material to pulling reports and arranging/utilizing the information found on the reports results. The buttons are: **Find, Auto Filter, Sort, Rollups, Slice, Export, Default Settings,** and **Definition.** See screenshot.

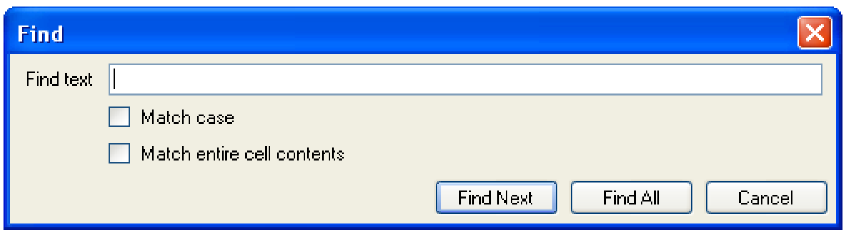


Reports buttons are on the right end of the ribbon.

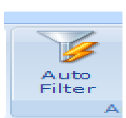
Find 

You can search for specific text, numeric values, or special characters in the content displayed in a report using the **Find** feature. Cells in the report page currently being viewed that contain the values you searched for are highlighted. Content on other pages or drill-down levels in the report must be searched separately.

To Find content in reports
1. Open the report you in which you wish to **Find** content.
2. Click the **Home** tab.
3. Click the **Find** button on the ribbon to open the **Find** window.



4. Type the search value you want to **Find** in the report in the **Find Text** field. To highlight cells in the report only if the content matches the exact case you use in the search value, select the **Match Case** check box.
5. Click the **Find Nex**t button to close the **Find** window and highlight the first cell in the report.
6. To highlight cells in the report only if the cell content exactly matches the search value you enter in the **Find Text** field, select the Match Entire Cell Contents check box.
7. Click the **Find Next** button to close the **Find** window and highlight the first cell in the report that matches the search value you entered OR Click the **Find** button to close the window and highlight all the cells in the report that match the search value that you entered.
8. To find the next instance of the search value without opening the **Find** window, click the **Find** button on the ribbon's **Home** tab.
9. To clear the search value you entered without opening the **Find** window, click the **Clear** button on the ribbon's **Home** tab.

Auto Filter 

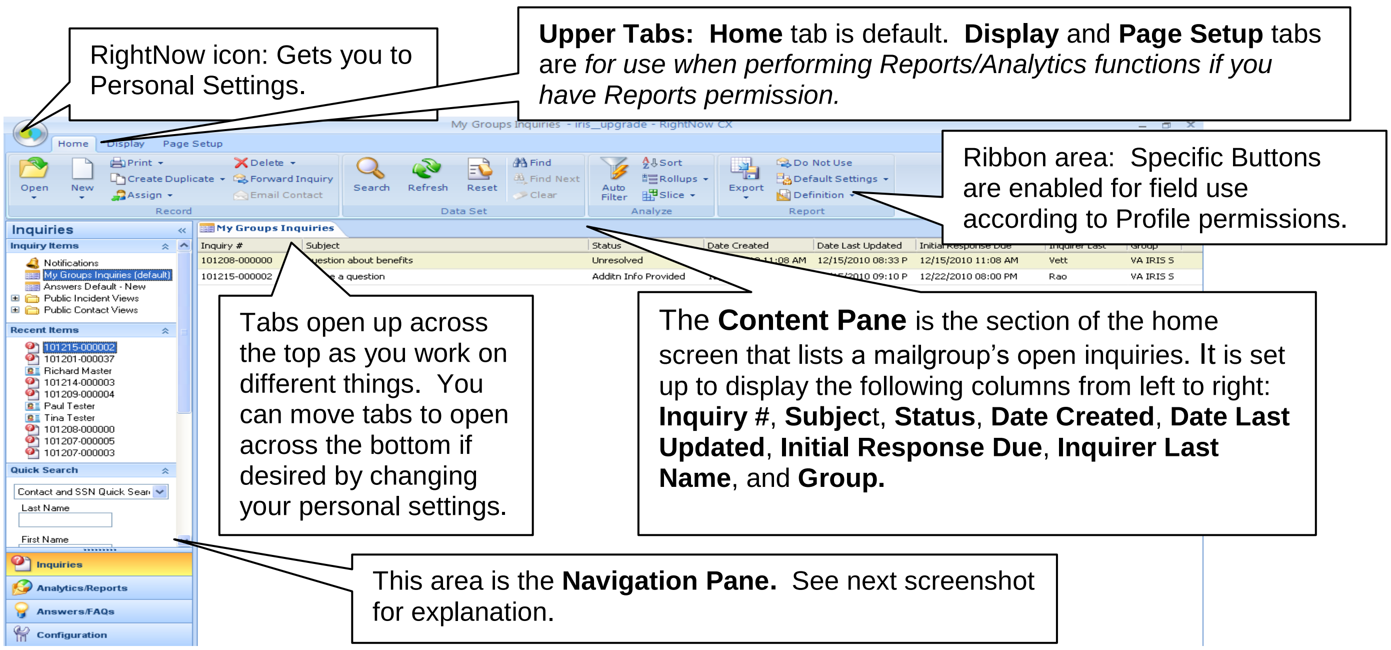
This button allows access to filter on any column in the report that you have pulled. Once this is enabled, click the down arrow in any column heading.

Other Report Buttons:
Sort, Rollups, Slice, Export, Default Settings, Definition buttons

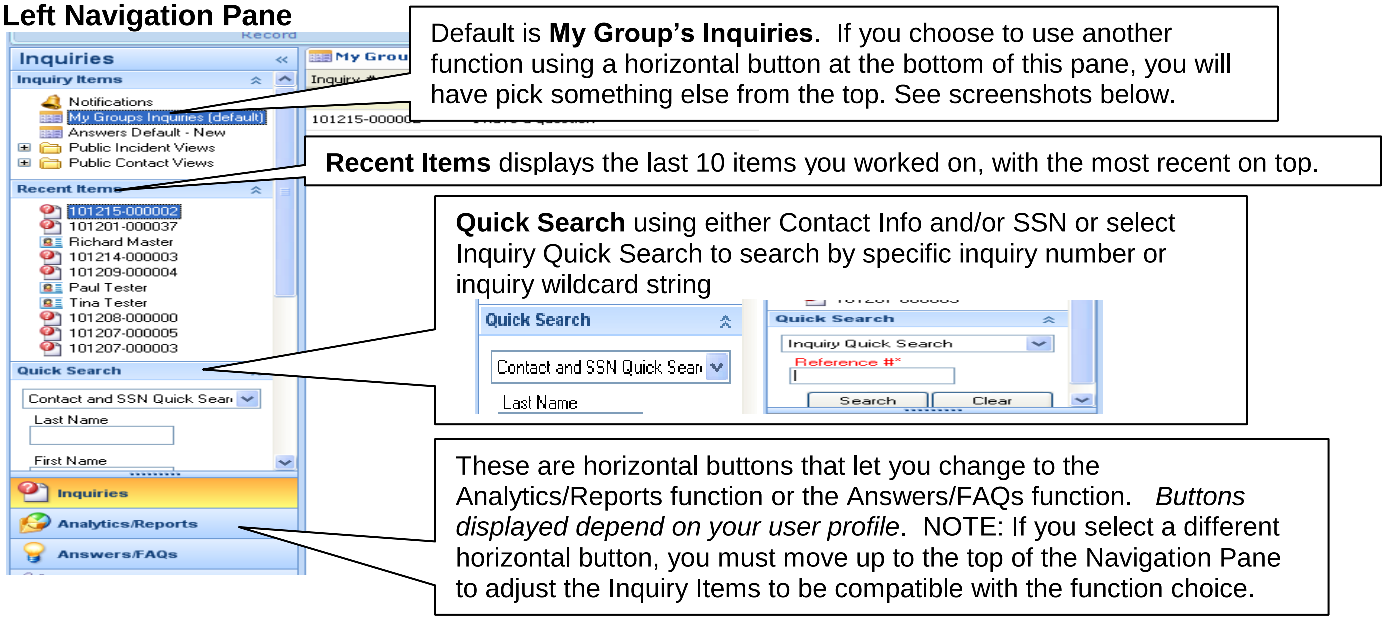
Sort is used to select what columns to sort by and the sort method.
Rollups This button allows you to define rollups to group and organize the rows in the report. Rollups appear as expandable/collapsible sections in the report where the records in each section are grouped by the rolled-up column. You can roll up the report by one or more report columns. Right-click a column and select **Edit Calculations** from each grouping level. A window opens where you can edit section calculations.
Slice This button allows you to slice the report group and organize the data. You can group the data set in buckets based on your slice definition. You can view the entire data set or each slice individually. Each slice may be displayed as a tree or as links at the top of the report. Multiple columns can be used as slice criteria to further separate data in each bucket.
Export This button allows you to report data in an alternate file format and provides a snapshot of the current data set in the selected file format. The formats allow easy use for analysis or viewing in

other commonly used applications. Several of the formats preserve the current settings for the generated data file. You can also export using a delimited format. **NOTE: To export a report to Excel, you must be running *Excel* 2003 or later versions. The export functionality is designed to utilize XML parsing that is available in *Excel* 2003. No earlier Excel versions are supported.**
Default Settings This button allows you to save personalized display and data settings for later use or remove them and restore to the default.
Definition: This button allows you to view or export the definition of the report.
Choose **View** to view detailed descriptions of all the tables, filters, variables, columns and levels associated with the report. Choose **Export** to export the report definition to an xml file.

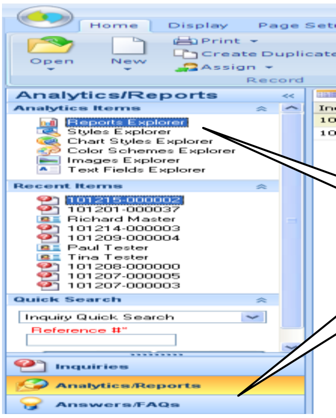
The Inquiry Console/My Group's Inquiries Home Screen (default screen)



Left Navigation Pane



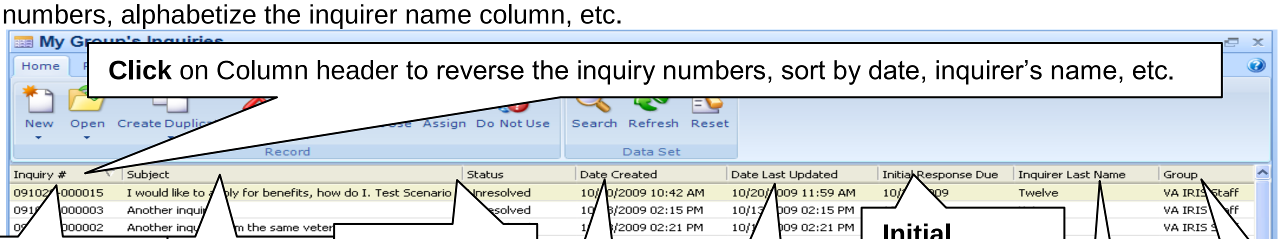
To Navigate to another function:
If you pick a button other than Inquiries on the bottom of the left navigation pane, you will need to also pick a corresponding item from the top of the nav pane.



1. Select **Analytics/Reports**, on the bottom of the nav pane,

2. Select **Reports Explorer**, on the top of the nav pane,

Column Sorting: By **clicking on a column header**, you can reverse the order of the inquiry numbers, alphabetize the inquirer name column, etc.



Click on Column header to reverse the inquiry numbers, sort by date, inquirer's name, etc.

Inquiry number; year, month, day and assigned number based on order of arrival in the system on any given day.

Subject displays the first 50 characters of the inquiry content.

Status displays one of multiple status codes. All status codes display on this screen, **except** for **Solved** which appear on another screen.

Date Created displays the date and time the inquiry was first submitted.

Date Last Updated displays the date and time the inquiry was updated.

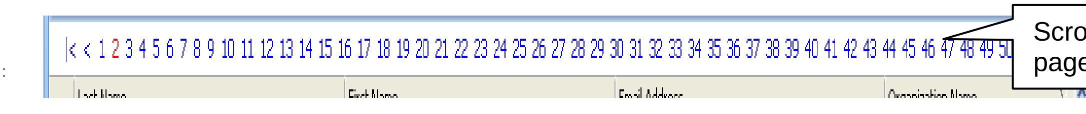
Initial Response Due displays the initial due date, based on the 5 business day response rule. When more than 5 business days old and no response sent, the line item turns red.

Inquirer Last Name

Group displays the mail group to which the inquiry is assigned.

Scroll to next page of inquiry listings

If you have more inquiries than can be displayed on one screen, you can scroll through additional display screens to see the others. Click on the page scroll numbers at the top of the screen right above the inquiry listings. **The page scroll capability will only appear if there are multiple pages.**

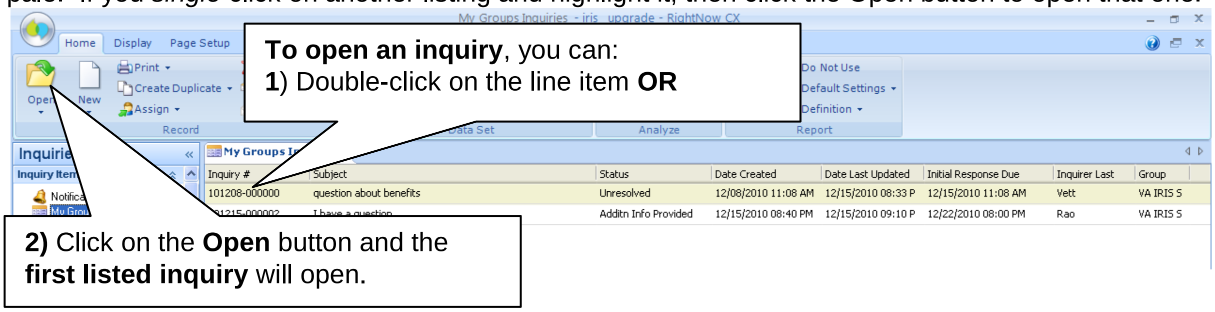


Scroll to following pages.

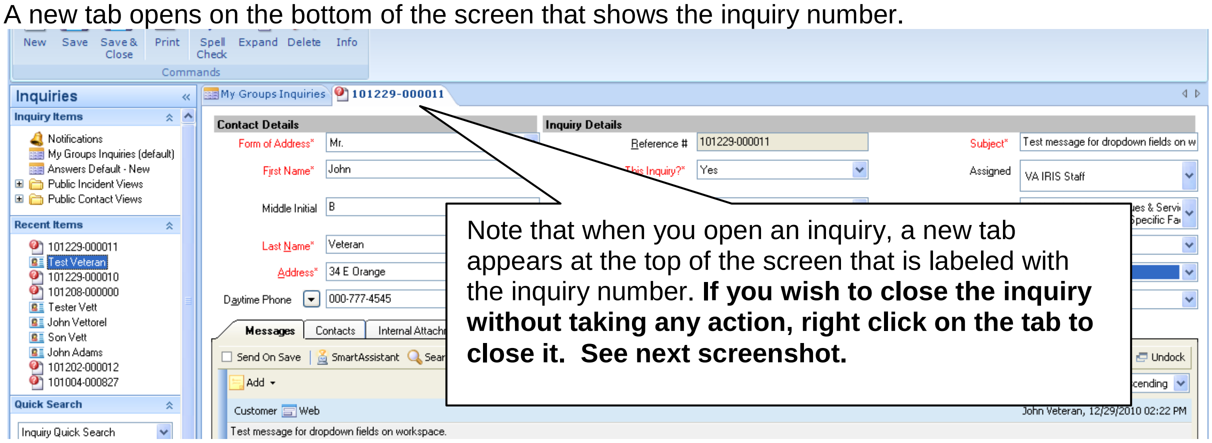
Responding to Inquiries

Navigation and Basics

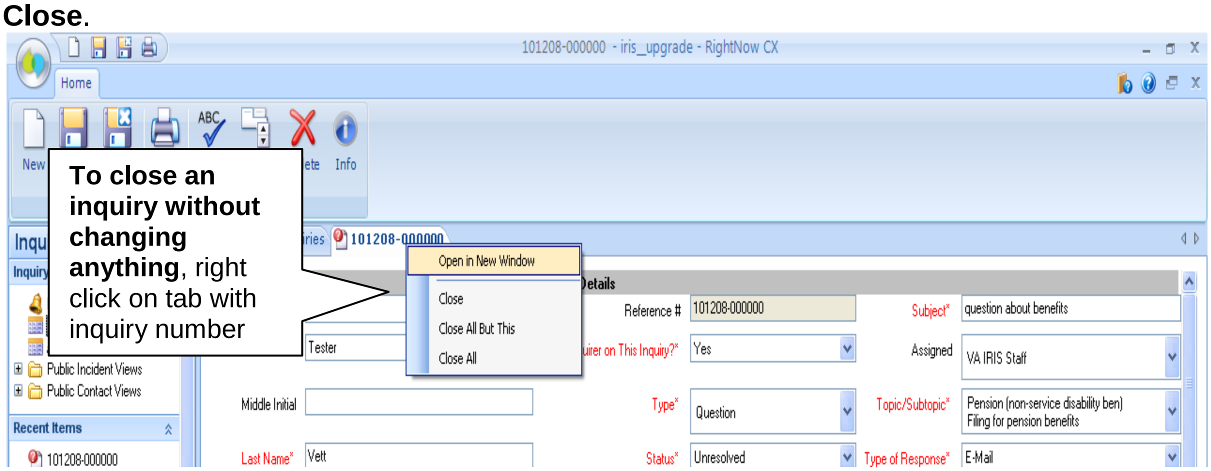
Opening an Inquiry: Double click on the line item **or** click on the **open** button to open the highlighted inquiry. NOTE: The first inquiry listed is the default for the highlight. The highlight is very pale. If you *single* click on another listing and highlight it, then click the Open button to open that one.



When you open an inquiry, it opens up and occupies the entire screen to the right of navigation panel. A new tab opens on the bottom of the screen that shows the inquiry number.

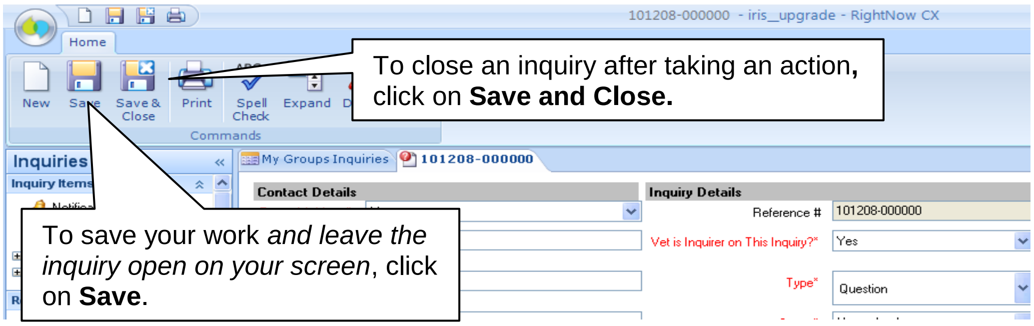


Close an inquiry without taking any action, right click on the tab at the top and select **Close.**

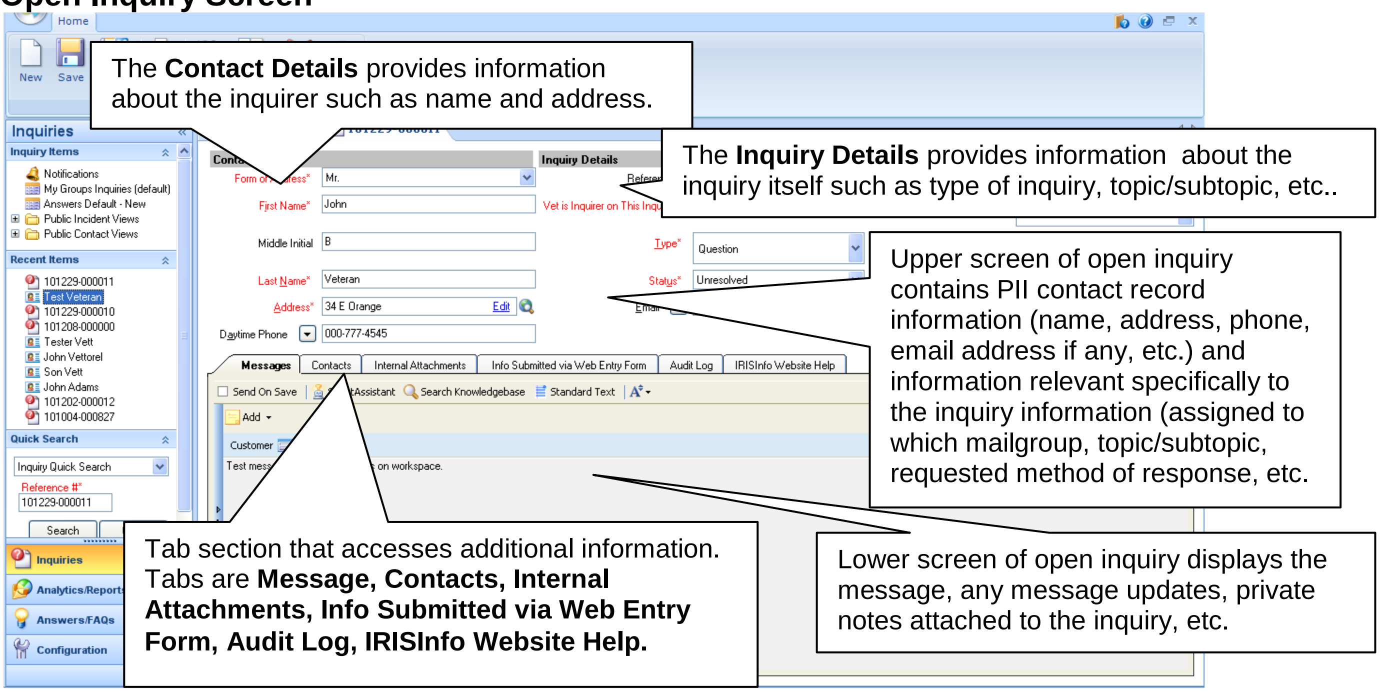


Save/Save and Close buttons

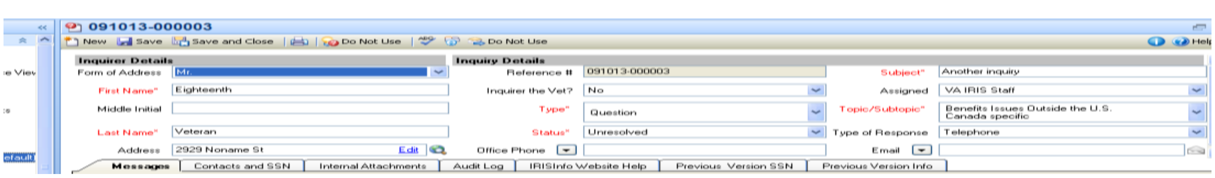
Save button will **save all your work but leave the inquiry open on your screen**. This is useful if you want to print the inquiry with everything that you have done and Save since opening the inquiry or work on it for some other reason.
Save and Close button: To close an inquiry after taking an action, click on **Save and Close** button which saves everything and also closes the inquiry**.**



Open Inquiry Screen

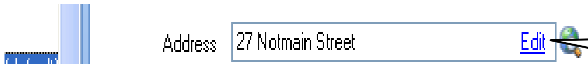


Upper Screen of open inquiry: Upper screen contains two sections: **Inquirer Details** on the left and **Inquiry Details** on the right. Note that the Personal Identifying Information (**PII**) that fills the fields on the upper screen contain information found in the Contact Record for this inquirer. If information is edited on the upper screen or in the Contacts tab, the changes will be made automatically in both places.

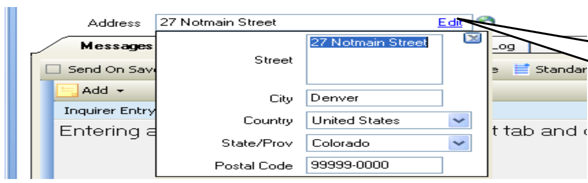


Inquirer Details Fields in the left section:

Form of Address: Mr, Mrs, Ms, etc.
First Name of Inquirer
Middle Initial of Inquirer
Last Name of Inquirer
Address displays part of the address data which has been combined in one field. To see all of the address data, you must click on the **Edit** link in the **Address** field for the box to open up and show all of the combined address data that has been entered. **NOTE: If no address data has been entered, you must enter something in the address box to** assign/reassign or otherwise deal with an inquiry and no address data has been supplied by the inquirer, **you can get past this field by selecting only country and/or state and country** as you are able to determine from the rest of the content. **Not all fields in the address box need to be completed.**



The **Address** field displays part of the address data that has been entered, if any. Click on **Edit** to see all the address data.

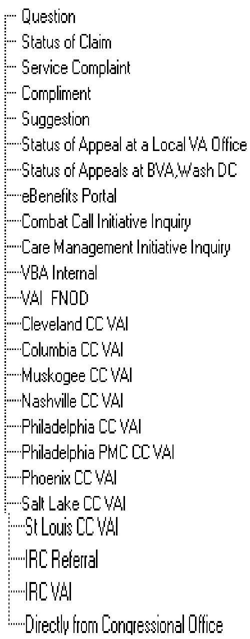


The see all of the address data that has been entered, click on the **Edit** link in the **Address** field.

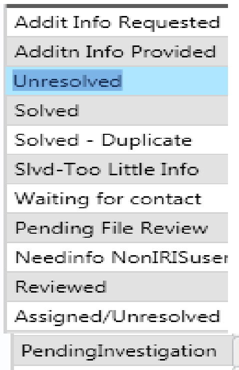
Inquiry Details in the right section:

Reference Number: This is the inquiry number which is the year/month/day hyphen and six digit number assigned by the system in order of receipt.
Vet is Inquirer on this Inquiry? Yes or No
Type: Type of inquiry as selected by the inquirer (codes may be added or removed by IRIS System Admins): The types ***visible to the public*** are:
Question
Status of Claim
Service Complaint (lack of courtesy or service received from VA)
Compliment, Suggestion
Status of Appeal at a Local VA Office
Status of Appeal at BVA in Washington DC
Combat Call Initiative Inquiry

There are more types available to VA users; those not visible to the public were created for and are used almost exclusively by VBA staff. **The inclusive list** is:



Status: Gives the status of an inquiry; most often will be **Unresolved**. NOTE: If the inquirer updates his inquiry, the system will automatically set the **Status** field to **Additional Info Provided**. Status codes are:



Status Code Definitions in order of appearance:

- **Additional Info Requested**—If a responder needs more information from the inquirer to be able to respond, s/he may wish to manually put the inquiry into this status until the necessary information is obtained, at which time the response can be sent and the status manually set to Solved.   This status code leaves the inquiry on the open inquiry screen and does NOT move it to another console.
- **Additional Info Provided**—This status is set automatically when an inquirer updates an existing inquiry. Inquirers may update the same inquiry for 31 days after the last action taken on that inquiry by the inquirer OR by VA. If the inquirer continues to update the same inquiry, the life cycle of the inquiry can be considerably prolonged. If more than 32 days transpire from the last action, the veteran must submit a new inquiry. Note: this does not change its status within VA. If 32 days have passed without a response or other action **from VA**, the inquiry stays open until there is a disposition by VA.   Inquiries do not expire.
- **Solved**— This status is set automatically when you send a response and save the inquiry; it may be overridden manually if you reset it to another status code prior to **Save**. (**NOTE**: if the inquirer did not provide an e-mail address, the IRIS cannot send an electronic response and an alternate means must be used. If an alternate method is used, a **Private Note** should be entered and the status manually set to Solved.) Solved inquiries are moved to another console to which you must navigate using the **Search** feature. Once in Solved status for 6 months with no activity of any kind, inquiries are archived and no longer are displayed on the Solved console. After they have been in Solved status for 19 months with no activity of any kind, they are purged from the system. **DO NOT EVER REASSIGN AN INQUIRY IN SOLVED STATUS**; if you do, the receiving location will never know they have it because Solved inquiries go into another basket and are never seen unless searched for**.**
- **Pending File Review**—Used by VBA when a claims file needs to be reviewed prior to responding.
- **Need Info from Non-IRIS User**—Used when **a VA employee/organization not in the IRIS** must be consulted before a response can be sent.
- **Solved Duplicate**—Set manually when duplicates are received. Duplicates are created when inquirers repeatedly click the submit button at the bottom of the IRIS customer entry form despite being told to click the button only one time. Every time the button is clicked, a duplicate with a new number is generated. If a responder receives duplicate inquiries, s/he must respond to one of them and then set the status of the duplicates to Solved Duplicate in the status field.
- **Reviewed**—Set manually by a supervisor or other designated employee who is required to review a response before it can be sent.   Changing to this status code informs the responder that s/he can now send the response.
- **Assigned/Unresolved**—Set manually in VBA call centers when inquiries are assigned to designated staff and still require responses.
- **Pending Investigation**—Set manually when a response cannot be sent until an official determination can be made that a response can be sent to the inquirer (i.e., an entity responsible for more than one veteran, such as a custodian, whose status must be verified before information can be released.)
- **Waiting for Contact**—Responder is making attempts to contact by phone to resolve.

- **Awaiting Guidance**—Set manually by call centers when supervisory review is necessary before response can be sent.

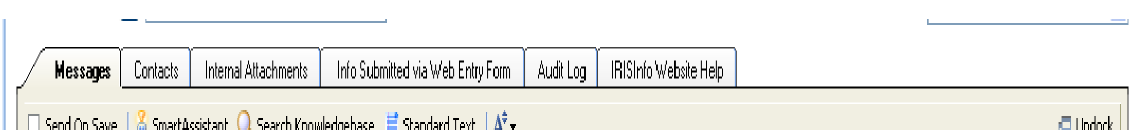
Daytime Phone: This field is for the **daytime phone number.**
Subject: Repeats first fifty characters of the beginning of the inquiry message if submitted through the VA Web site. If the inquiry is created from inside VA, the subject line may not match the first fifty characters of the inquiry.
Assigned: The **Assigned** dropdown box shows the mailgroup to which the inquiry is assigned and is also the place where you can reassign an inquiry to another mailgroup.
Topic/Subtopic: Lists the Topics and subtopics selected by the inquirer on the IRIS customer entry form. (List is subject to change.) To see the subtopics, open the Topic by clicking on its + sign to the left of the topic name. **Topics** are:

- Compensation (Service-Connected Benefits
- Pension (Non-Service-Connected Benefits)
- Survivors
- Appeals of Denied Claims
- Benefits Issues Outside the US
- Debt Collection Questions (non-medical)
- Economic Recovery Payments
- Committee on Waivers & Compromises
- Vocational Rehab & Employment (VRE)
- Education/GI Bill/WAVE
- All Health & Medical Issues & Services
- Homeloan Guaranty/All VA Mortgage Issues
- Life Insurance
- Burial & Memorial Benefits (NCA)
- Enduring/Iraqi Veterans & Families
- Consumer and Public Affairs
- E-Benefits Portal
- National Veterans Employment Program
- Minority Veterans—Policy & Programs
- VA Ctr for Women Vets, Policies & Progs
- All Technical, Password and Access Probs
- VA E-Authentication Project
- Not A VA Issue (Another Federal Agency)
- CCI Project

Type of Response: The inquirer selects the method for response: email, US Mail or telephone. If s/he wants a response other than email, the email field will most often be blank.
Email: Email address of the inquirer. **If there is no email address, you cannot send an electronic response.** The inquirer will have requested another **Type of Response. NOTE:** If more than one individual is referenced on an inquiry and persons listed other than the inquirer also have email addresses, each of them will receive the responses.

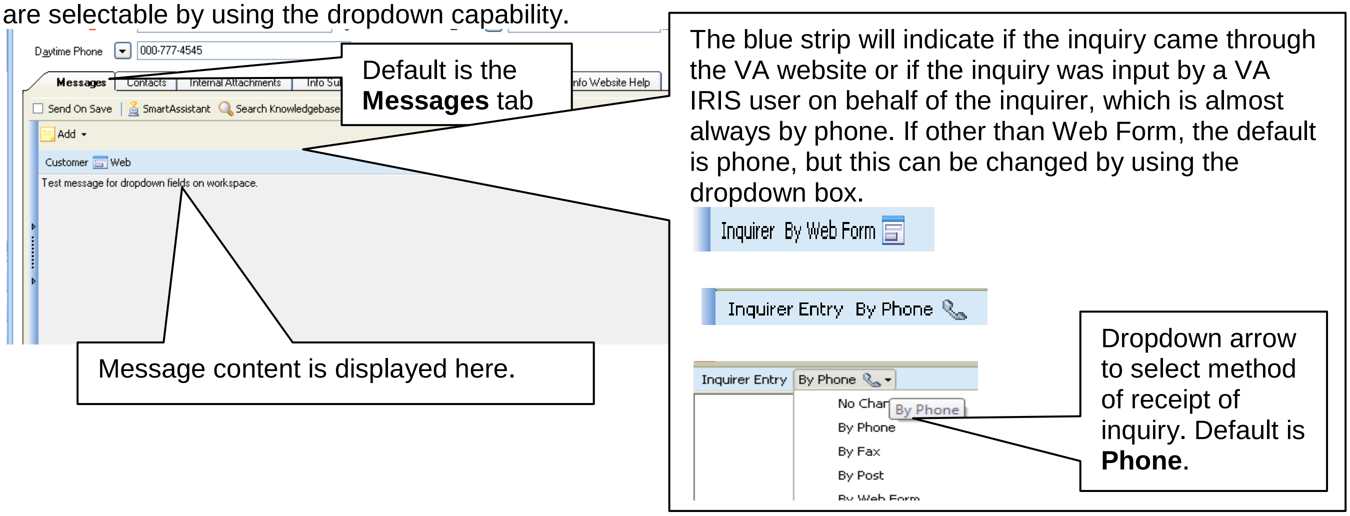
Inquiry Tab Section:

The opened inquiry tab section displays tabs for **Messages** (default), **Contacts**, **Internal Attachments** (attachments added for internal use only), **Info Submitted via Web Entry Form, Audit Log**, **IRISInfo Website Help**, The tabs available to everyone are described below. **Note:** Additional tabs may be added for specific groups or purposes.



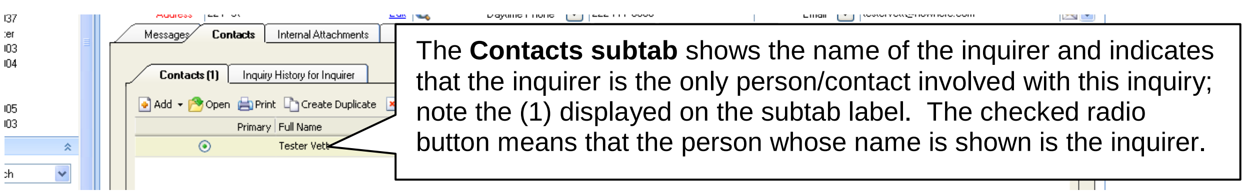
Inquiry tab section

Messages Tab is the automatic default when you open in inquiry. This displays the message from the inquirer and also provides access to additional features needed when responding to an inquiry. It also displays on the blue strip how the inquiry entered the system, either by the inquirer coming through the web on VA's Internet website, or if it was entered by a VA employee on behalf of the inquirer, which is almost always by phone contact via the VA call centers. Other methods of contact are selectable by using the dropdown capability.

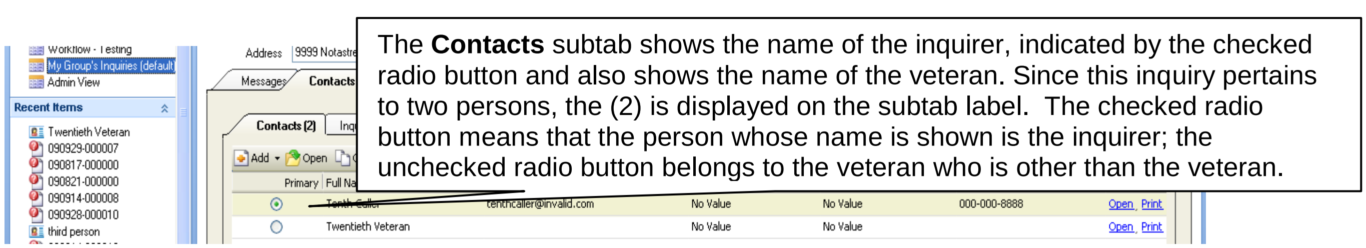


Contacts Tab provides information using subtabs relevant to the contact record (personal) information. **PII** is **initially** recorded and edited using the **Contacts** tabs and forms; the fields on the upper screen of the inquiry were auto-filled based on the information from the Contacts function**.** **After the information is initially recorded using the Contacts function, fields that appear on the inquiry upper screen can be altered and will change the data in the corresponding contact record.**

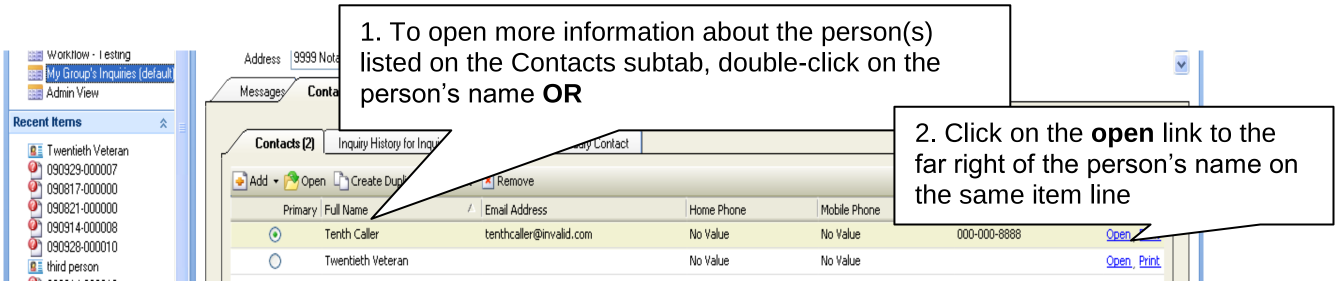
The **Contacts subtab** displays the "official record" of the full name, email address, and phone numbers, if provided during the customer entry process. If the inquirer is the veteran, and/or is inquiring only for him/herself, there will be a single line item with inquirer data and the **Contacts subtab** will show **(1)** after its label. This means that this inquiry only concerns one person. The radio button that is checked means this person is the inquirer.



If the inquirer is not the veteran but is asking for/about a veteran or represents the dependent of a veteran and supplies information regarding that other person, the Contacts tab label will display (2) or (3) since the inquiry involves two or three persons: the inquirer and the veteran OR the representative (inquirer), the veteran and the dependent. That second (and third if applicable) person's name will also display. **The person whose data has a checked radio button is the inquirer.** The unchecked radio button provides information about the veteran who is not the inquirer. **DO NOT CHANGE THE RADIO BUTTON SETTINGS.**



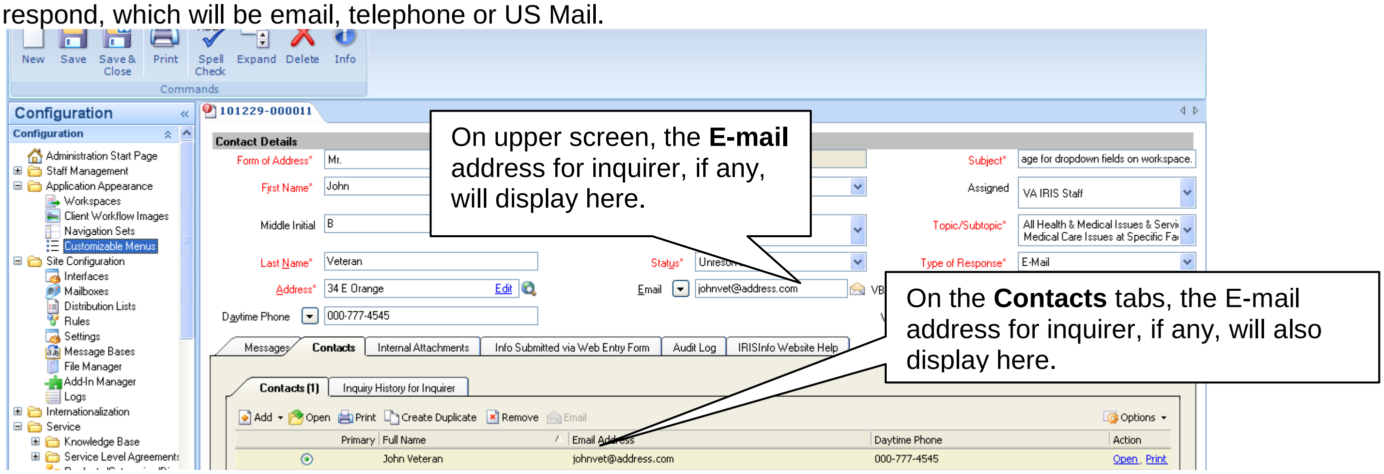
To access more information about the person(s) listed on the Contacts subtab, **double-click on the person's name** or on the **open** link to the far right of the person's name on the same item line. **Do NOT click on the radio buttons.**



E-Mail Address Data and No E-Mail Address Data

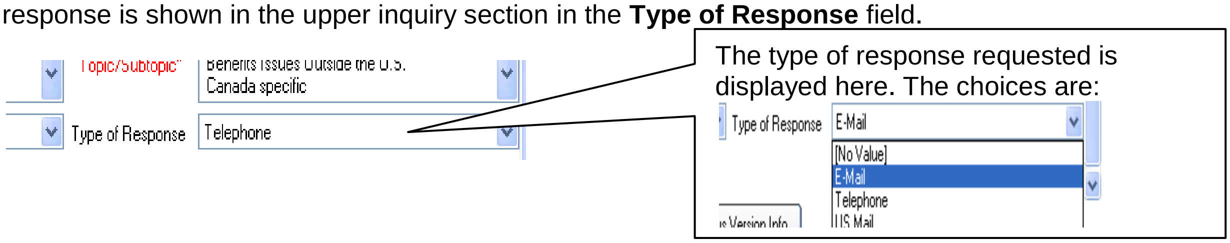
Inquiry has an e-mail address
The e-mail address, if any, is shown on the upper screen and also on the **Contact** tab and; not all inquirers have or supply their own e-mail, so this field may be blank. **If the inquirer has no email address,** you cannot send an IRIS response electronically.

You **must** check the **Type of Response** field to determine by what means the inquirer wants VA to respond, which will be email, telephone or US Mail.



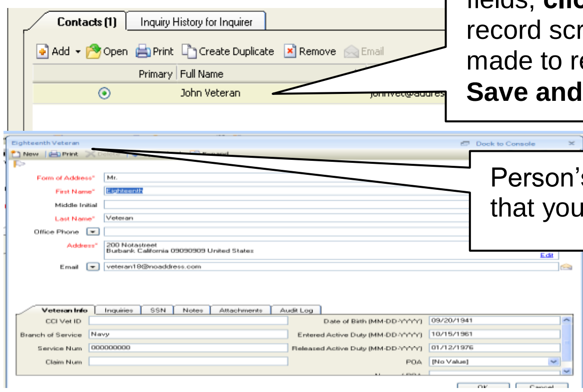
NOTE: if more than one person/contact is cited on a specific inquiry <u>and</u> both parties have email addresses <u>and</u> an email response is requested, BOTH persons will get the response.

No E-Mail Address on Upper Screen or Contacts Tabs: *<u>The IRIS cannot respond via e-mail without an e-mail address.</u>* The absence of an e-mail address is an indicator that the inquirer requested a response via telephone or surface mail rather than by email. The preferred method for response is shown in the upper inquiry section in the **Type of Response** field.



Edit an E-Mail Address or other personal information
If you need to edit an existing email address or any other **information pertaining to an inquirer**, you can **1)** edit from the fields in the upper screen **or 2)** you can click on the person's name on the **Contacts** tabs to access the personal information and edit any of the information recorded there.

If you need to edit the information about the veteran or other party mentioned in the inquiry but **who is NOT the inquirer**, you **must** use the **Contacts** subtabs by clicking on that person's name and then editing his/her information from there.



To edit an email address or to edit any personal data fields, **click on the person's name** to open the contact record screens for editing. Click **OK** when changes are made to return to the inquiry screen. When you **Save** or **Save and Close**, those changes will be recorded.

Person's name will appear at the top of the Contact Record so that you know whose contact record is being edited.

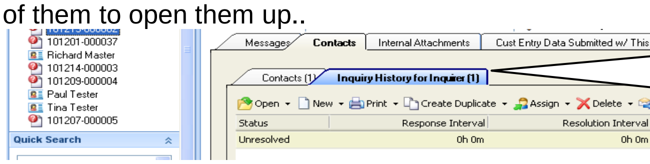
Duplicate E-Mail Address Error:

If you enter an email address for a contact and then click Save, but get a Duplicate E-Mail Address message, you must reconcile the problem and determine if the same email address is in use by another person, or if you are duplicating an existing contact record, or determine there is another issue concerning the email address. You may need to delete an email address to resolve the problem.

Inquiry History Subtabs under Contacts Tab

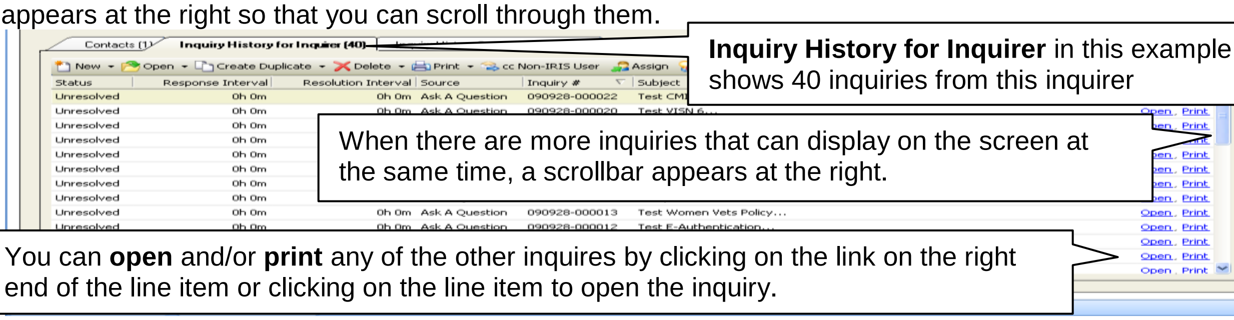
Inquiry History for Inquirer tab

This tab will list all inquiries still in the system (closed inquiries are purged at 24 months) that came from this inquirer. The tab label shows in parenthesis the number of inquiries in the system that have yet to be purged due to age. All of the inquiries from this inquirer will be listed; you can click on any of them to open them up..



The **Inquiry History** in this example shows 1 inquiry from this inquirer, which is the inquiry that you have opened on your screen.

In the following example, the inquirer has a history of inquiries. The tab shows 40 prior inquiries from this inquirer. You an open and/or print any of the others. This list is long enough that a scroll bar appears at the right so that you can scroll through them.



Inquiry History for Inquirer in this example shows 40 inquiries from this inquirer

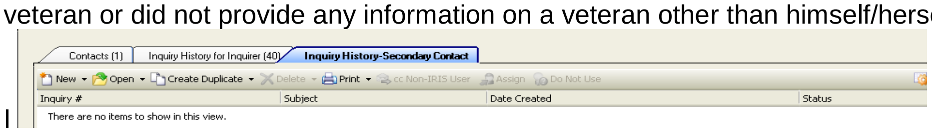
When there are more inquiries that can display on the screen at the same time, a scrollbar appears at the right.

You can **open** and/or **print** any of the other inquires by clicking on the link on the right end of the line item or clicking on the line item to open the inquiry.

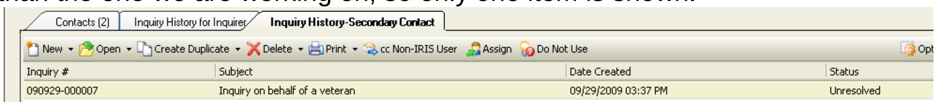
Inquiry History Secondary Contact tab

The secondary contact pertains to the other person(s) involved with this inquiry. If the inquirer (the primary) is asking about a veteran (the secondary party), this tab will display information about that other person. If the inquirer represents the dependent of a veteran, there will be more than one secondary contact listed. There will be an entry for the dependent and another for the veteran.

In this example, there is no secondary contact information on that tab because the inquirer was the veteran or did not provide any information on a veteran other than himself/herself.

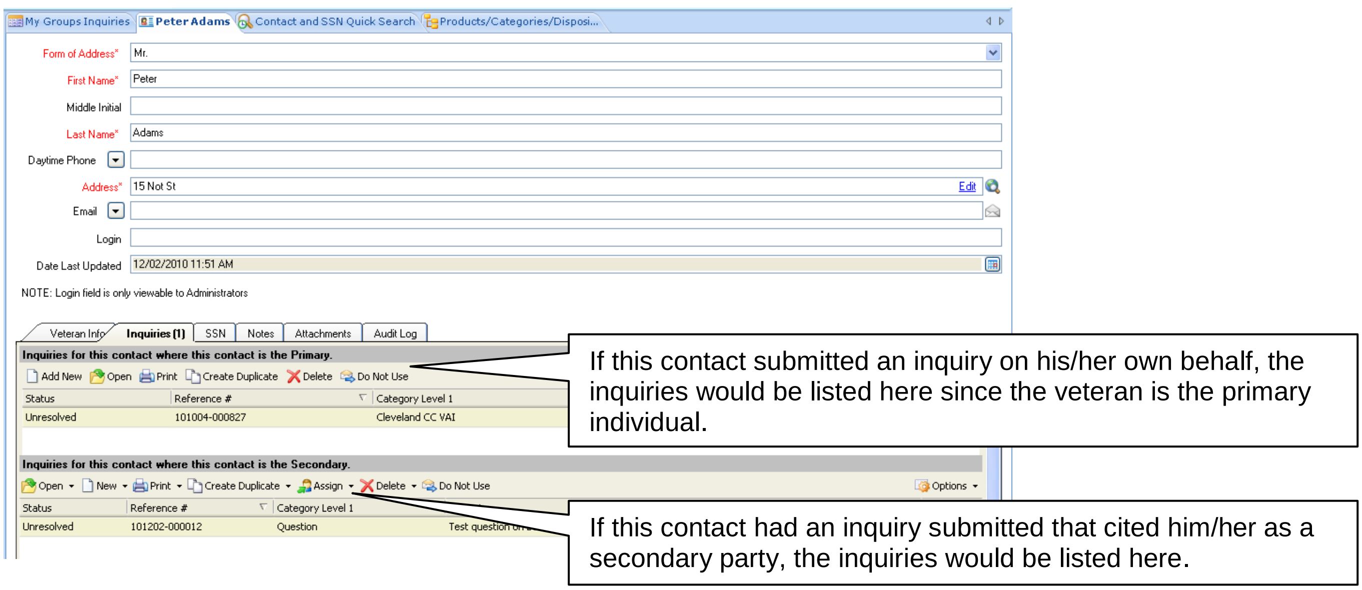


In this example, an inquiry was submitted on behalf of a veteran (the secondary contact) who is other than the inquirer, but we have no other inquiries from or pertaining to this veteran in the system other than the one we are working on, so only one item is shown.



Inquiry History on a Contact Record (Primary and Secondary)

On a contact record, the **inquiry history** will display all the inquiries submitted by this individual and/or will show any inquiries on which this person was cited as a secondary contact. If the latter, it means that someone sent in an inquiry about or on behalf of this person. If a third party is involved, a second item will display in the Secondary history. For example, if the representative of a dependent of a veteran submitted an inquiry, the primary contact history will show inquiries submitted by the representative and the secondary history will have inquiries cross-referenced for the veteran and for the dependent. See screenshot below.

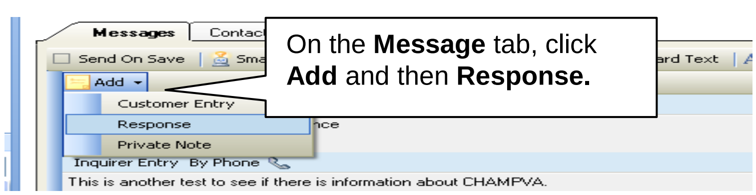


Adding Attachments; attach to response or for internal use

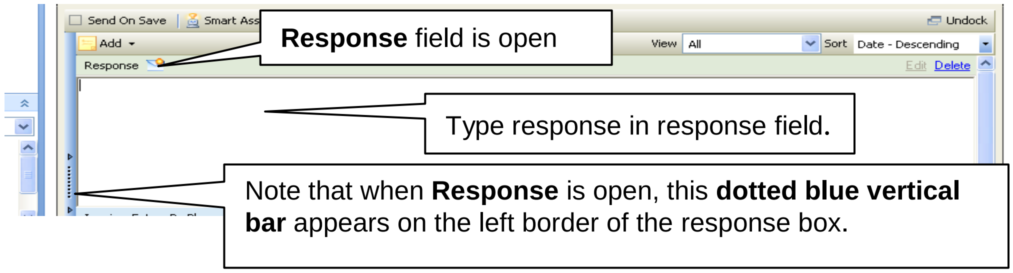
There are two different functions for adding attachments to an inquiry:
1. To send an attachment to the veteran, use a feature that appears on the left side of the response box. See instruction a below.
2. To attach a document *for internal use only* use the **Internal Attachments** tab. See **Internal Attachments** section b below.

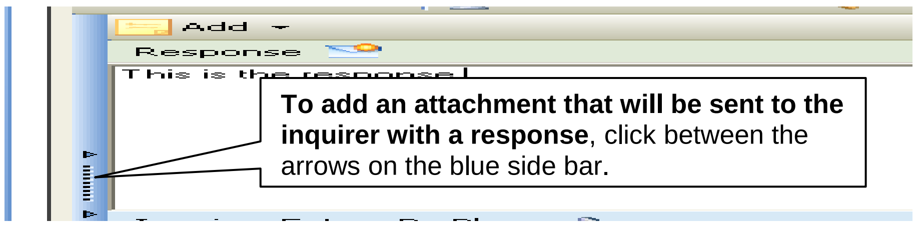
a. Attach a File/Document to A Response (Attach and Send to the Inquirer with Response).

To **attach a document to a response**, you must use the response box in the **Message** tab. Open the inquiry and click on **Add** on the **Message** tab. Select **Response** and type in response.

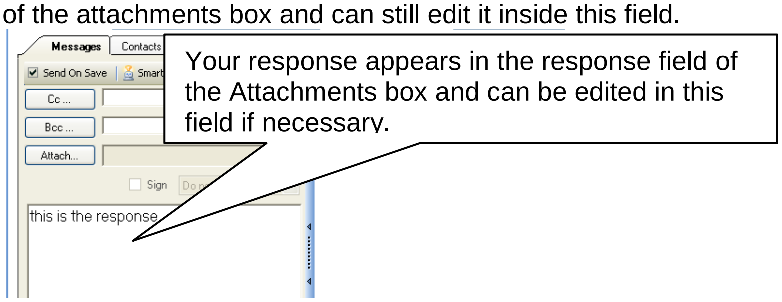


When the response box is open, a dotted blue vertical bar appears on the left border of the box with a marked space between two arrows. Type in your response, and **click on the dotted blue bar to open the attachment box.**

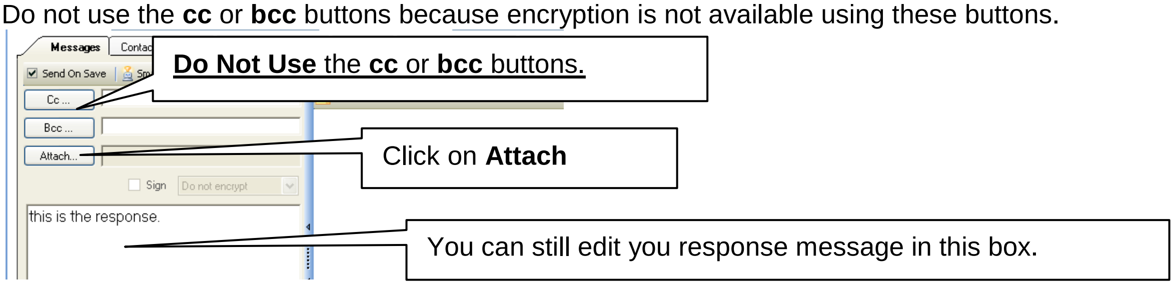




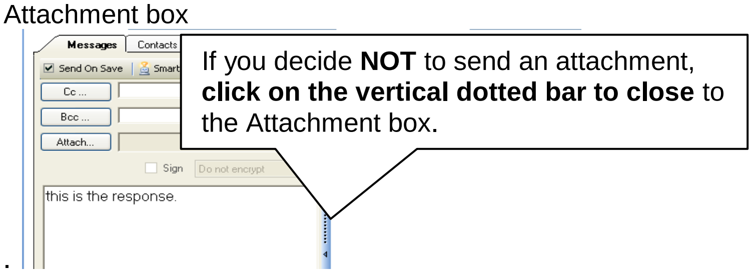
When the attachment box opens up, you will find your response typed into the response field of the attachments box and can still edit it inside this field.



Do not use the **cc** or **bcc** buttons because encryption is not available using these buttons.



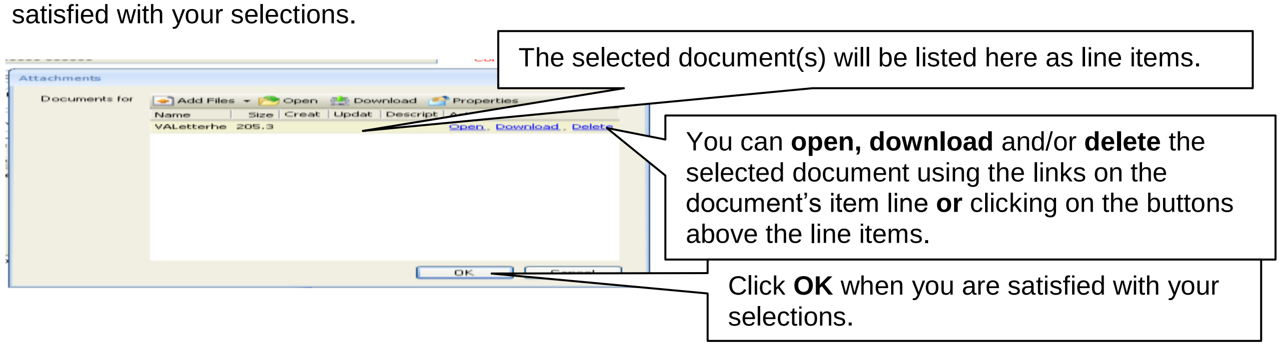
If you decide NOT to send an attachment, click on the vertical dotted bar to close to the Attachment box



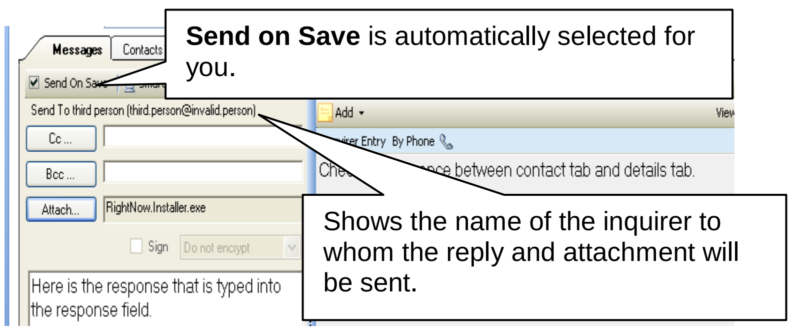
.

If you decide to continue with the attachments, click on **Add Files** and find the attachments.

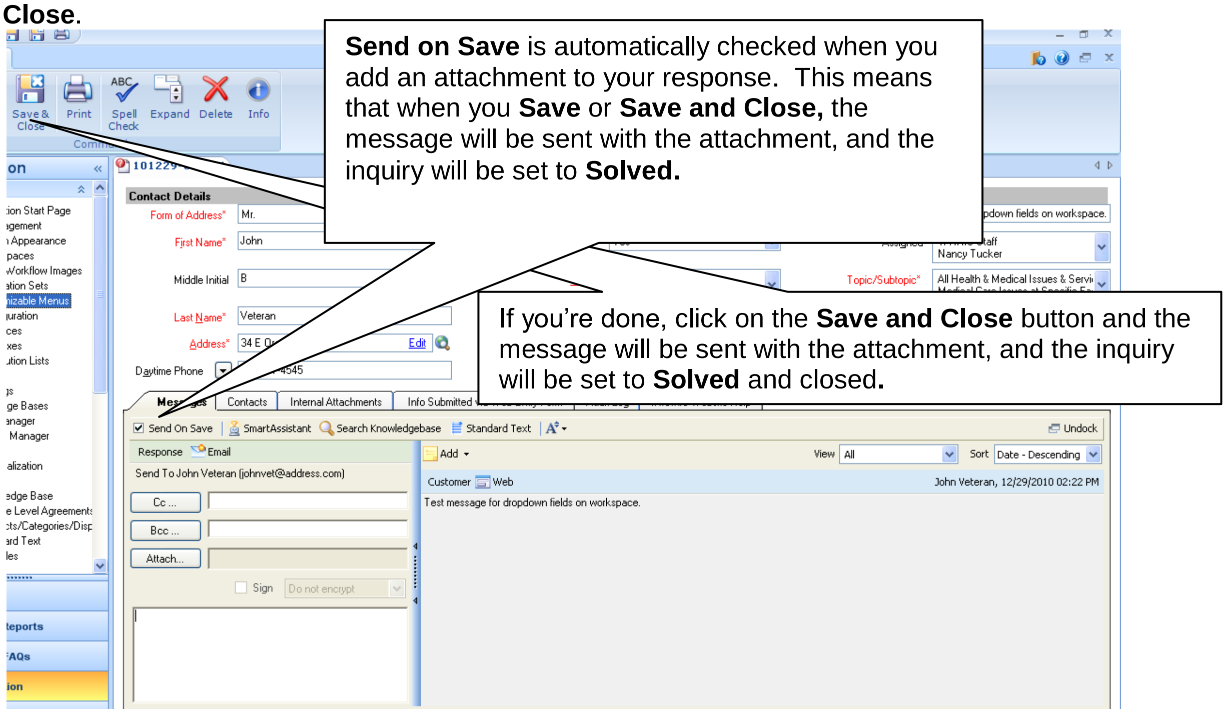
You can **open, download** and/or **delete** the selected document(s) using the links on the document's item line **or** clicking on the buttons above the line items. Click **OK** when you are satisfied with your selections.



Once you click **OK,** the Attachment box shows the name of the inquirer to whom the attachment is being sent. **Send on Save** is automatically checked.

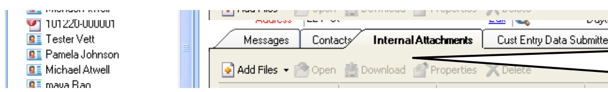


When you are satisfied with the response and the attached documents, **click Save** or **Save and Close**.



2. Attach A File for Internal Use Only; will NOT be sent to inquirer

To attach a document **for internal use only** (will not be sent to inquirer), click on the **Internal Attachment** tab when the inquiry is open on the screen.



Internal Attachments tab is where any files/documents can be attached **for internal use**.

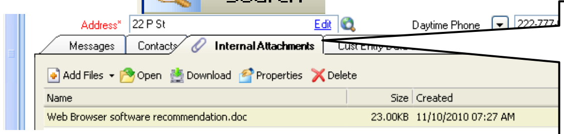
To attach documents for internal use, do the following:

1. **Click** on the **Internal Attachments** tab
2. **Click** on **Add Files.**
3. **Find and select** the documents (Browse looks at your machine only; Search goes outside your machine)
4. When the documents are successfully attached, the paper clip symbol will appear on the **Internal Attachments** tab label and the document will be listed on the tab screen. You can **open**, **download** or **delete** the document that has been attached by using those respective links at the right end of the line item or by choosing buttons for those functions (functions will be applied to the highlighted document in the attached document listings.

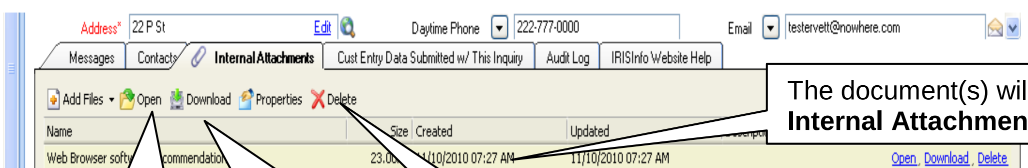
1. Click on **Internal Attachments** tab.

2. Click on the **Add Files** button.

3. Browse your own machine or **Search** beyond your own machine to find the file/document(s) and select the items to attach.



4. When the documents are successfully attached, the paper clip symbol will appear on the **Internal Attachments** tab label.



The document(s) will be listed on the **Internal Attachments** tab screen.

You can **Open** the highlighted document if you want to make sure it's the

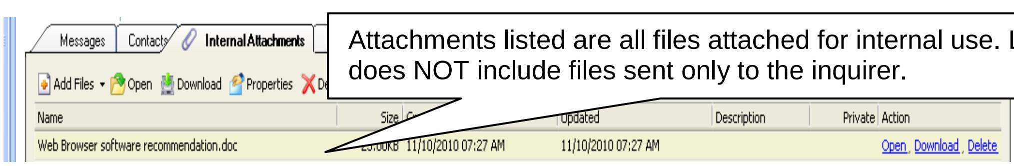
The **Download** button allows you to save the highlighted file/document to your machine in another location. If desired.

You can **Delete** the highlighted document if you wish.

You can also **open, download** and/or **delete** the attachment(s) on that line item using these selections instead of using the buttons on the top of the tab

Viewing attached files:

To view a file attachment that was appended to the inquiry by a VA employee for internal use, click on the **Internal Attachments** tab to see and open all the files that have been attached to the inquiry.



Attachments listed are all files attached for internal use. List does NOT include files sent only to the inquirer.

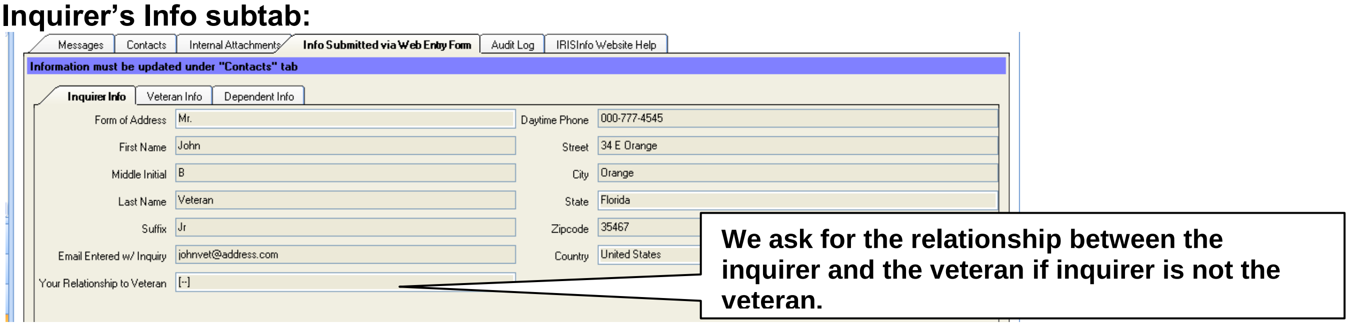
Info Submitted via Web Entry Form Tab

These tabs are read only and reflect the specific information that was input via the customer entry form on the VA website. <u>If the inquiry was constructed by a VA employee from inside the system, no information will fill these tabs.</u>

These tabs provide historical information only and **information in the fields in these tabs is not searchable.** You may need to copy information in these fields into the contact record to make it part of the contact record and make the information searchable.

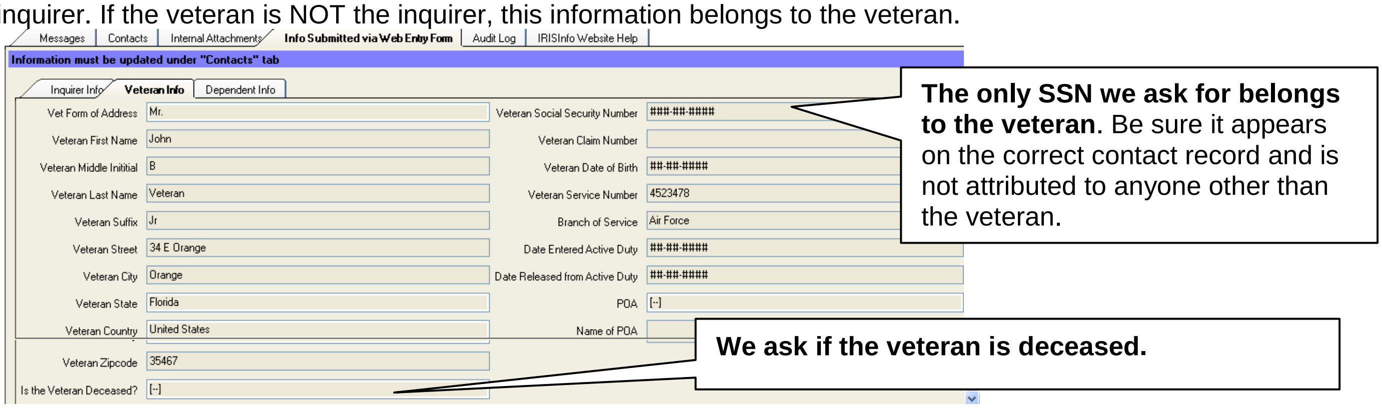
Subtabs contain information about the inquirer (who may or not be the veteran), the veteran, and information about a dependent of the veteran, depending on what the inquiry scenario is. For example:
If the inquirer is the veteran, the vet info will pertain to the inquirer.
If the inquirer is not the veteran and is inquiring about or on behalf of a veteran, the vet info pertains only to the veteran.
If the inquirer represents the dependent of a veteran, there will be information about the inquirer, the veteran, and the dependent.
NOTE: <u>The only SSN that we ask for is the SSN of the veteran</u>. If you copy an SSN into a contact record, <u>be sure it is copied to the veteran's contact record</u> and not to the contact record of the inquirer or the dependent if other than the veteran.

Inquirer's Info subtab:

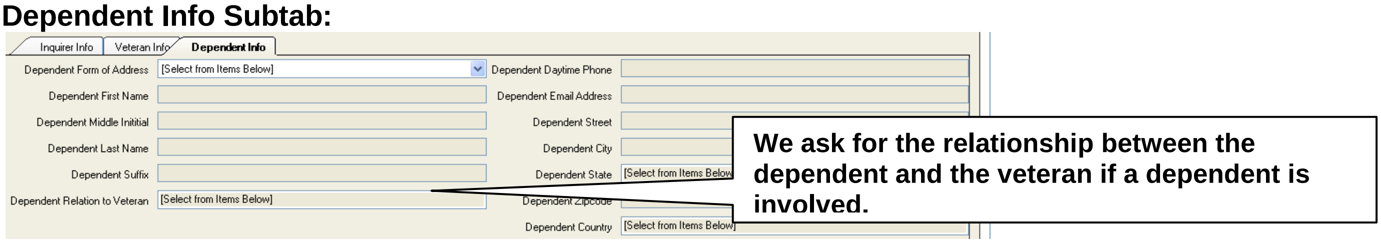


I

Veteran Info Subtab: If the veteran is also the inquirer, the information here will pertain to the inquirer. If the veteran is NOT the inquirer, this information belongs to the veteran.

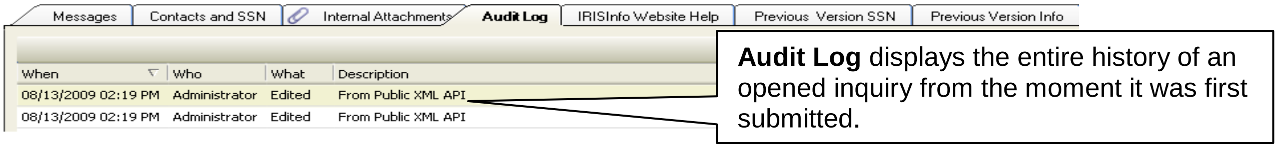


Dependent Info Subtab:



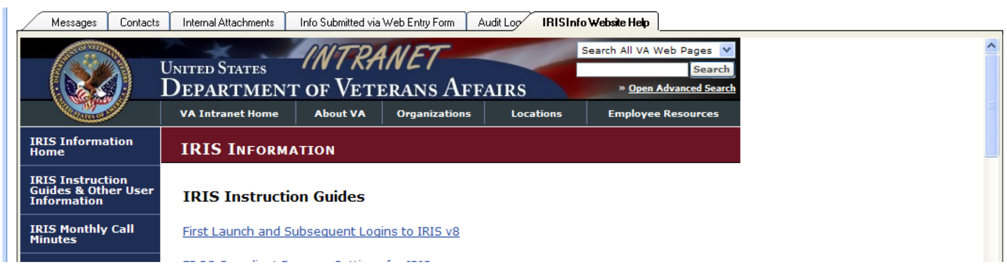
Audit Log tab

The **Audit Log** tab displays the entire history of the inquiry opened on your screen from the moment it was first submitted; the most recent action at the top of the list.



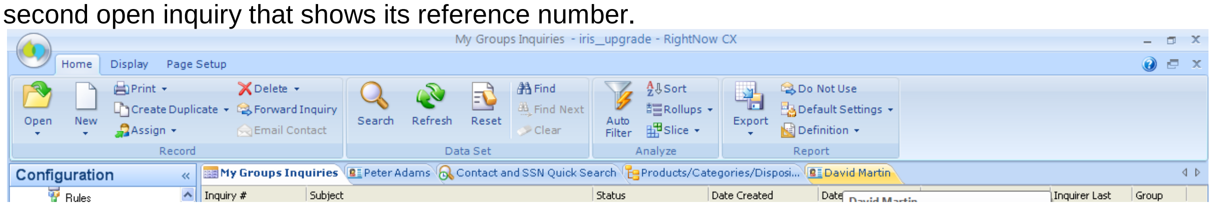
IRISInfo Website Help tab

The **IRISInfo Website Help** tab goes directly to the **IRISInfo Intranet website** at http://vaww.gov/irisinfo/irisguides.asp There are links to IRIS documents, including the instruction manual, the IRIS Participants Dropdown Listings, a list of all Answers/FAQs in the IRIS FAQ Knowledge Base, a list of all Standard Text Answers, links to recorded training, documents that address Internet browser settings, etc.

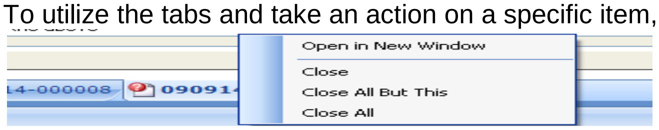


Tabs across the top (or the bottom) of the screen; tab for each open item

When you open more than one item/screen at the same time, each item has a tab that appears at the bottom of the screen showing the name of the contact if a contact record is open or an inquiry number if an inquiry is open on your screen, On the following screenshot, there is the **My Group's Inquiries** tab (default screen), an open inquiry for which the reference number displays on the tab, and a second open inquiry that shows its reference number.



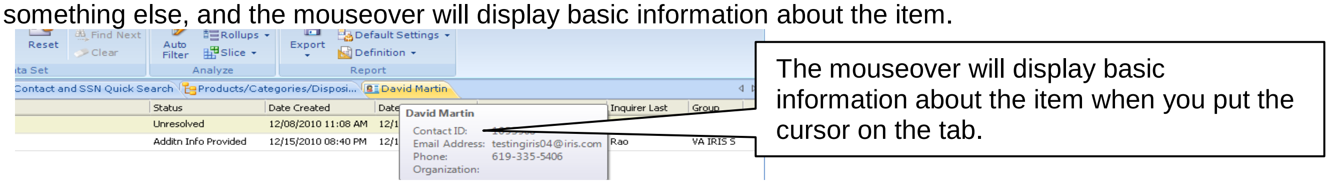
To utilize the tabs and take an action on a specific item, right click on the tab as follows.



When you have a contact record or an inquiry displayed on your screen and you open something else without closing the first item, the new item will overlay the first and will display a tab on the bottom of the screen. All open screens will have tabs that display at the bottom of the screen in the same way Excel spreadsheets have tabs for multiple sheets in a spreadsheet. To get descriptive information about the content of a tab that that belongs to the item, move your cursor over the tab that has an inquiry number and the mouseover will display basic information about the inquiry.

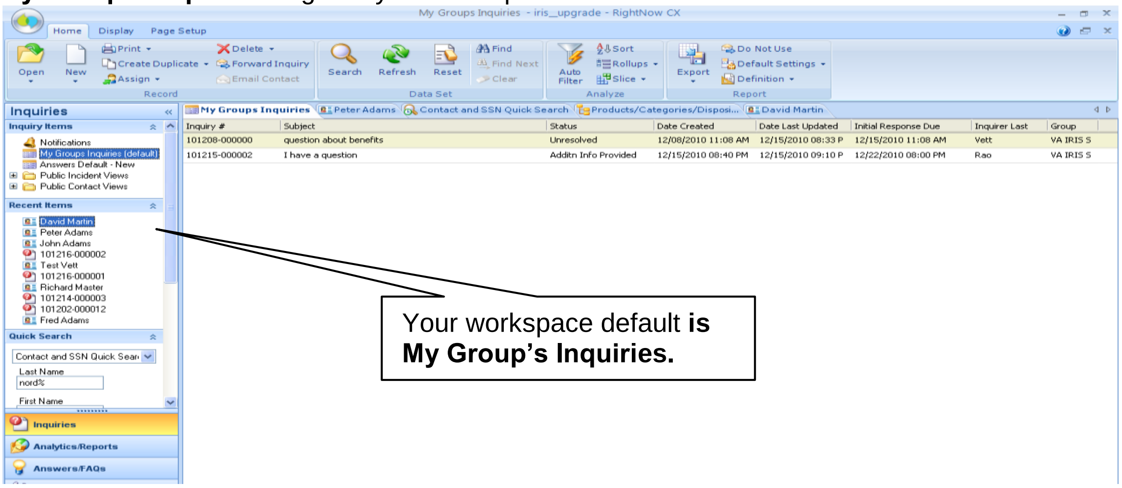
Mouseover Capability with bottom tabs

Put your cursor over the tab for the item that you opened but did not close when you opened something else, and the mouseover will display basic information about the item.



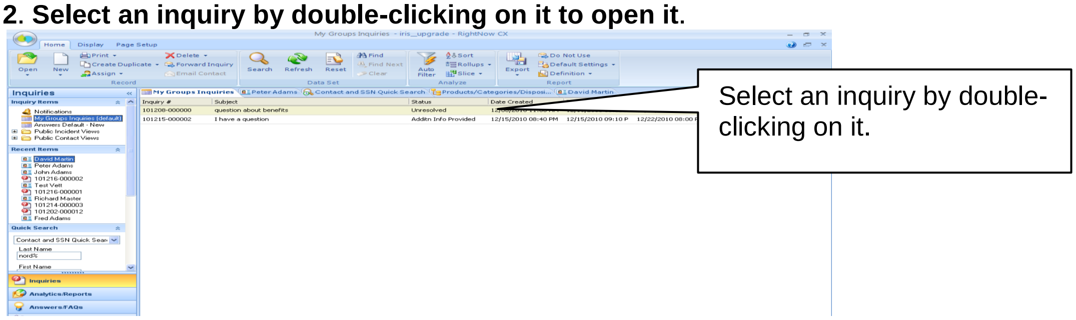
Handling IRIS Inquiries: The Steps

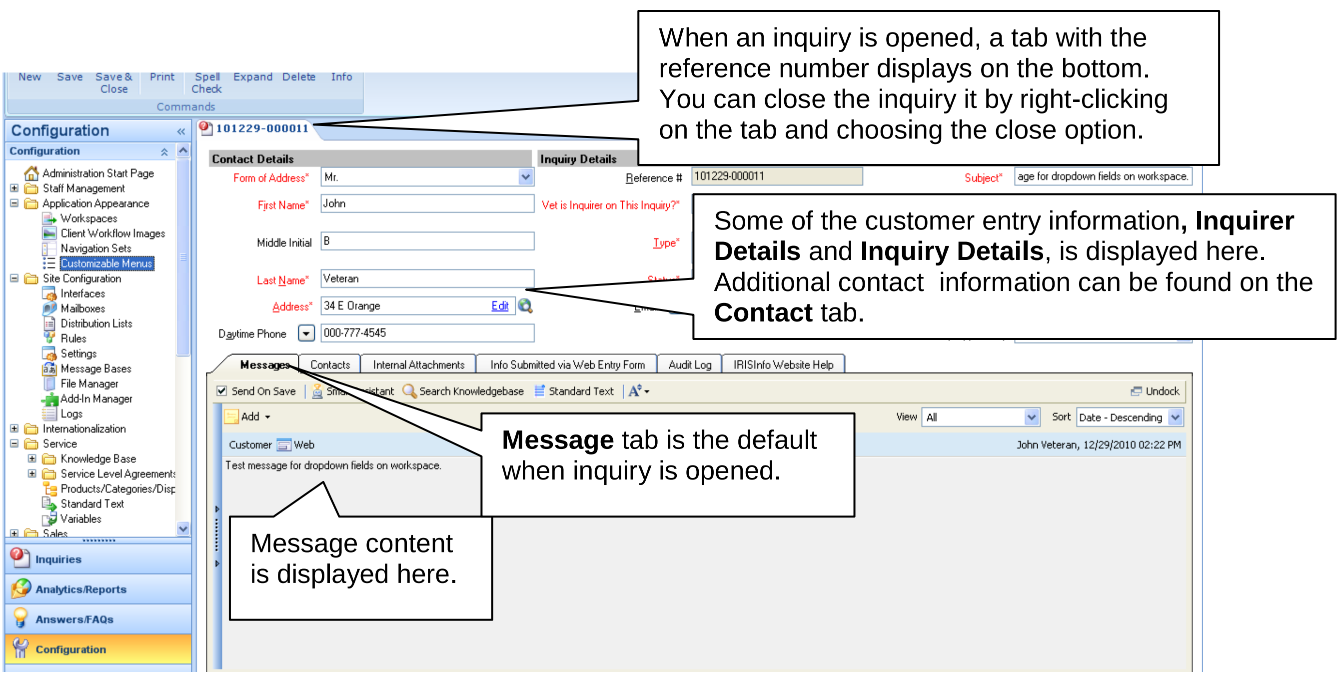
1. Open the IRIS. The screen default if **My Group's Inquiries**. If anything else is displayed, click on **My Group's Inquiries** to get to your workspace.



i

2. Select an inquiry by double-clicking on it to open it.



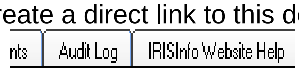


3. The **Messages** tab is the default tab when you open an inquiry. **Read** the message and **determine if it needs to be re-assigned** to another mailgroup. If you determine that inquiry does not belong to your mailgroup and thus needs to be reassigned, do the following:

- **Reassign an Inquiry if it doesn't belong to your mailgroup**

  To reassign an inquiry to another IRIS mail group: Click on the **Assigned** field dropdown arrow and choose the correct mail group and its subset to which the inquiry will be assigned. Mail groups are listed alphabetically: all VA program offices start with **VA**, all NCA entries begin with **NCA**, all VBA entries begin with **VBA**; all VHA entries begin with **VHA.** VHA facilities are listed by state; VISNs are at the bottom of the VHA listings and are shown as VHA-VISN X. **NOTE**: You must pick a subset of a selected mailgroup. If you pick a subset, that particular person will get an alert. If that person belongs to a corporate mailbox, everyone in the group will receive the alert.

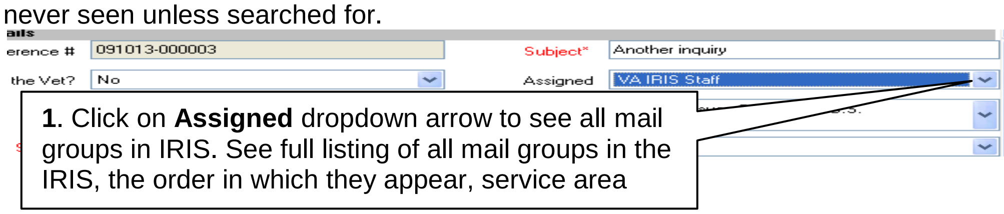
  See full listing of all mail groups in the IRIS, the order in which they appear, service area information, etc., at http://vaww.va.gov/irisinfo/irisguides.asp on the **IRIS Participants**

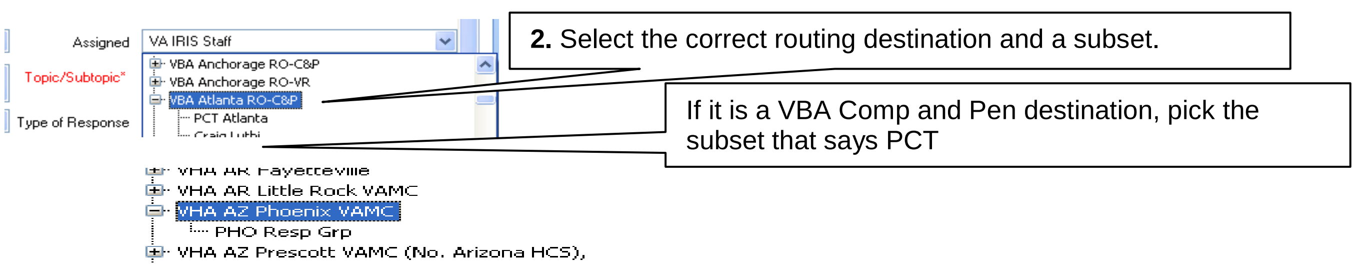
  Dropdown List document. Please create a direct link to this document **or** you can click on the **IRISInfo tab** on the opened inquiry. 

When needed, open up the **IRIS Participants Dropdown List** document, place your cursor in any text, and do a control+F to open a search box. Enter your search term for a location or program office. All occurrences of this term will be found so that you can find the correct one.

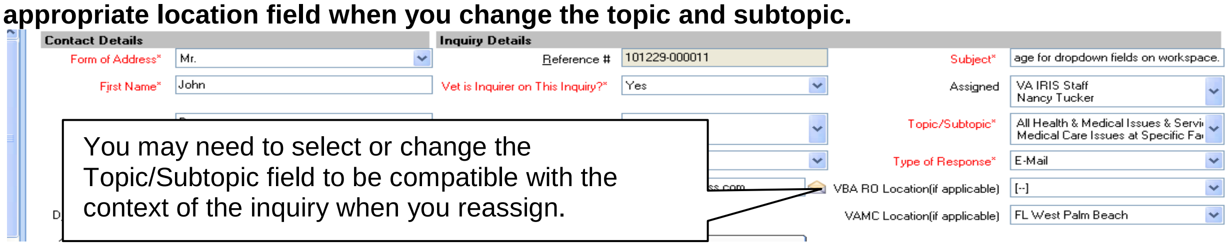
  You may wish to **Add** a **Private Note** before transferring if it would be helpful to the receiving location. Once the receiving group is chosen and the **Private Note** is entered, click on **Save and Close** to save any changes/additions and move the inquiry to the new group.

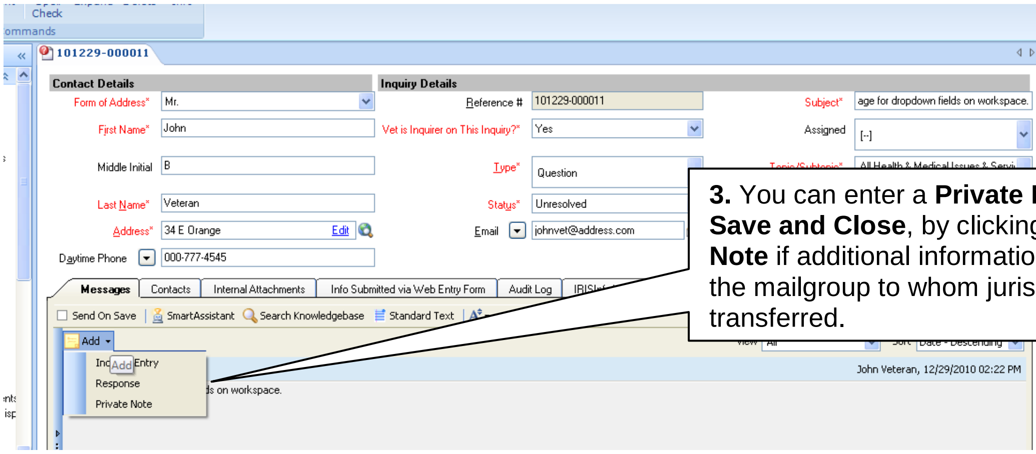
  DO NOT EVER REASSIGN AN INQUIRY IN SOLVED STATUS; if you do, the receiving location will never know they have it because Solved inquiries go into another basket and are never seen unless searched for.



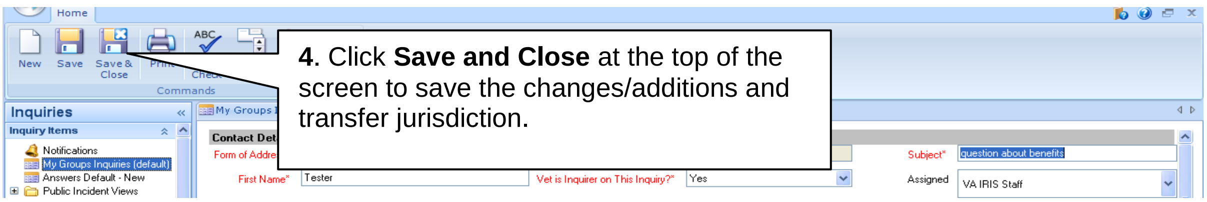


If you re-assign to another mailgroup, you may also need to change the Topic/Subtopic field to be compatible with the context of the inquiry. If the Topic and Subtopic pertain to a Regional Office or a Specific Medical Facility, you may need to select or change the appropriate location field when you change the topic and subtopic.





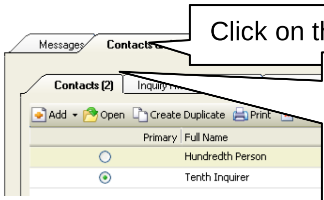
3. You can enter a **Private Note** *before* you **Save and Close**, by clicking on **Add>Private Note** if additional information will be helpful to the mailgroup to whom jurisdiction is being transferred.



4. Click **Save and Close** at the top of the screen to save the changes/additions and transfer jurisdiction.

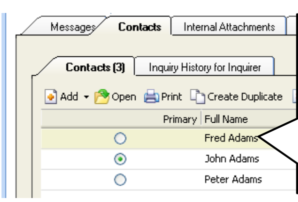
View More Contact Information from the Customer Entry data

The upper inquiry screen displays some, but not all, of the information entered by or on behalf the inquirer. To access additional customer entry Information, click on the **Contact** tab and then click on the person's name. Note: if two names are listed, it means that the inquirer submitted an inquiry on behalf of a veteran. **The name with the clicked radio button is the inquirer** and the other is the veteran. If three people are involved in the inquiry, three names should appear. **DO NOT CHANGE THE RADIO BUTTON.** When you click on the name, you will see the additional information submitted about that person/contact.



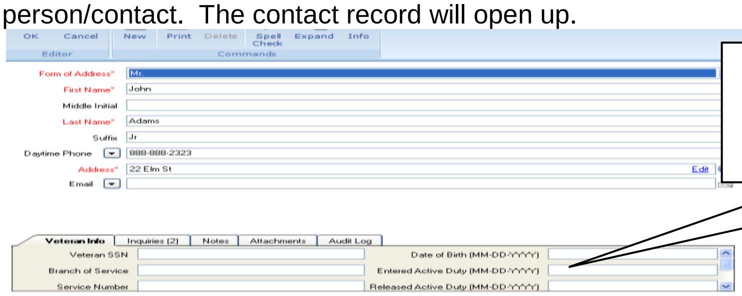
Click on the **Contact** tab for more customer entry info, if any.

If two names are listed, the (2) will appear on the tab; it means that the inquirer submitted an inquiry on material to or on behalf of a veteran. The name with the clicked radio button is the inquirer and the other is the veteran. When you click on the name, you will see the additional information submitted about that person/contact.



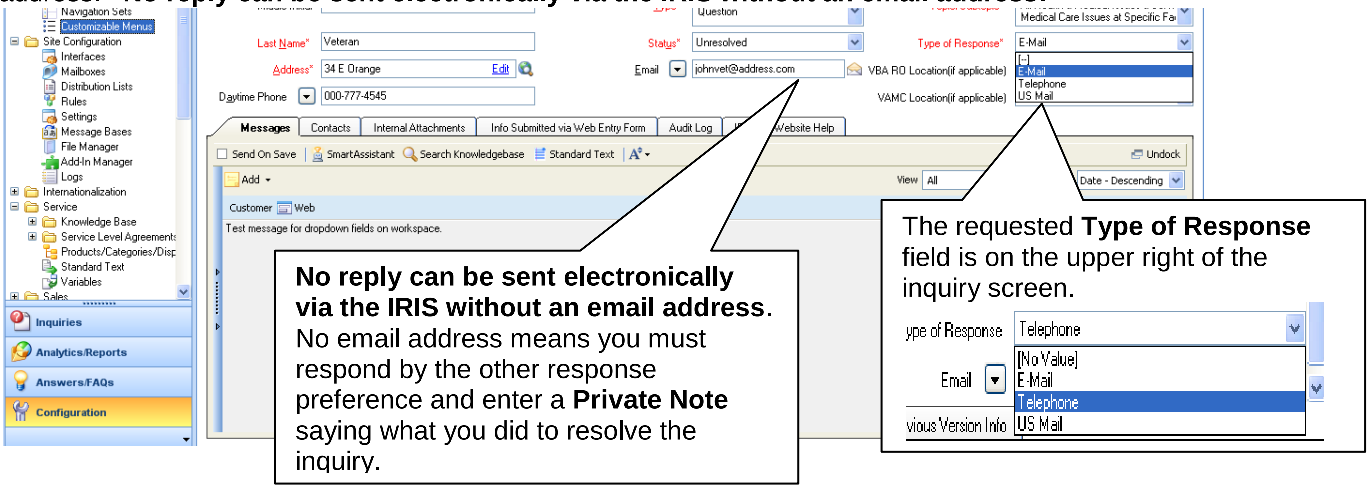
If three names are listed, it means that the inquirer submitted an inquiry material to or on behalf of the dependent of a veteran. The name with the clicked radio button is the inquirer; the other names would be the veteran and the dependent. When you click on the name, you will see the additional information submitted about that person/contact. The contacts tab will show (3).

In this example, the name clicked on is the veteran for whom the inquiry was submitted by another person/contact. The contact record will open up.



Additional information is displayed when the name is clicked. The name of the contact (inquirer and/or veteran) appears on the top of the information box.

4. Determine by what means the inquirer wants a response. The requested **Type of Response** field is on the upper right of the inquiry screen. There are three choices: E-mail, US Mail and Telephone. NOTE: If the inquirer wants other than an e-mail response, s/he probably did not enter an email address. **No reply can be sent electronically via the IRIS without an email address.**



If the preferred **Type of Response** is:

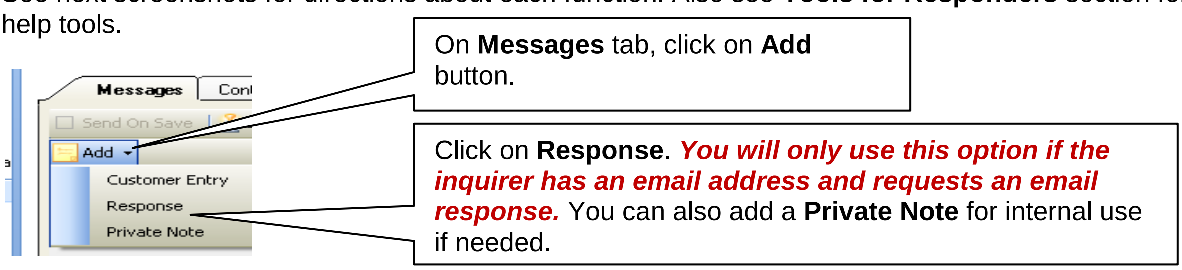
Telephone: You must call the inquirer at the phone number provided to resolve the inquiry. You must then enter a **Private Note** describing your resolution and manually change the status code to **Solved**. See **Private Note** instruction below.

US Mail: You must prepare and send a written communication through the mail and then you must then enter a **Private Note** describing your resolution and manually change the status code to **Solved**. See **Private Note** instruction below.

E-Mail: Send Response via Inquirer E-mail Address
Click the **Add** button on the **Messages** tab. This function is used to enter a **Response**, add an additional request from the inquirer to an existing inquiry using **Customer Entry** and/or enter a **Private Note.**

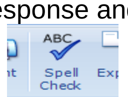
Private Notes are never sent to the inquirer and are for internal use only. **However, full printouts include private notes. If a FOIA request requires the disclosure** of IRIS inquiries that are printed out, the inquirer will see them. Choose your words carefully when entering **Private Notes**. Whichever function you choose from the dropdown selections of the **Add** button will drive what you do next. Your selection is displayed over the empty entry box.

See next screenshots for directions about each function. Also see **Tools for Responders** section for help tools.



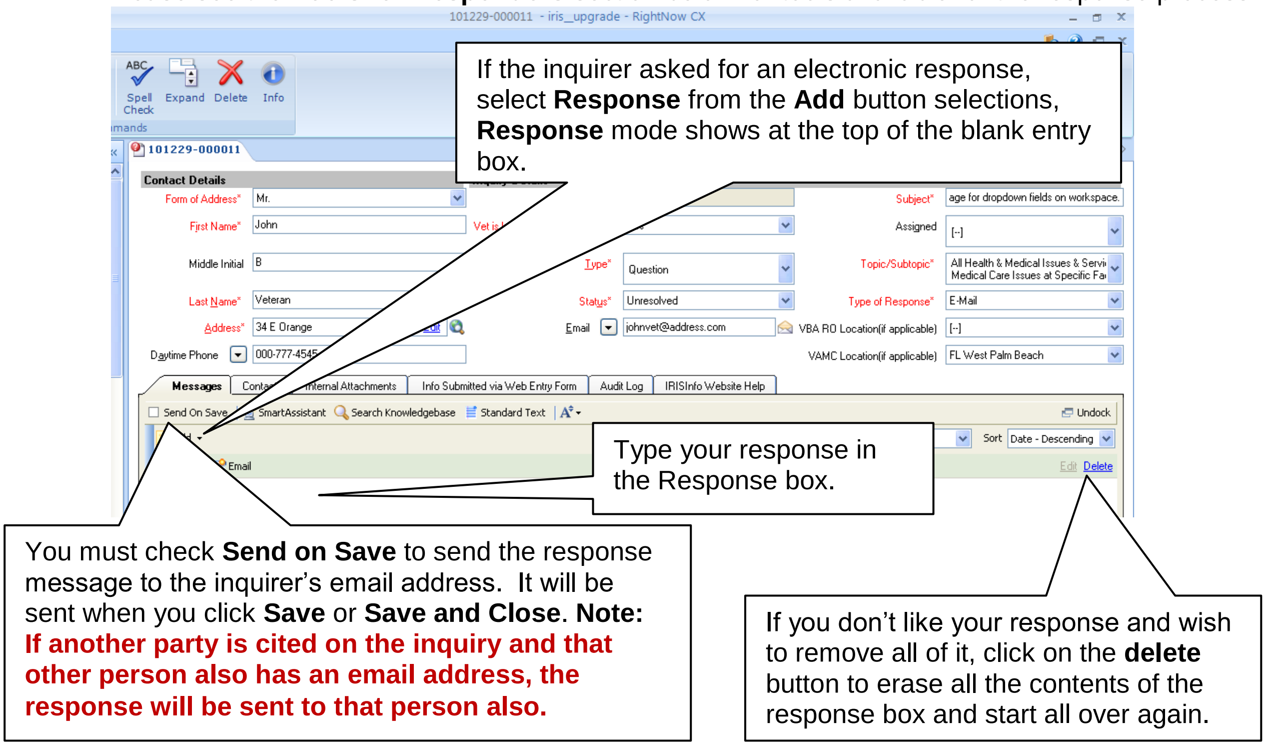
5. Add a Response, Additional Customer Entry information, Add a Private Note
<u>If the inquirer has supplied an email address and asks for an electronic response</u>, select **Response** and type your response in the box. YOU WILL ONLY SELECT RESPONSE WHEN YOU ARE SENDING A RESPONSE TO THE INQUIRER'S EMAIL ADDRESS. Be sure to comply with Privacy

rules about response content and do *not* use acronyms. Spell everything out. If you don't like your response and wish to remove all of it, click on the delete button on the upper right of the response box to erase the response and start all over again.

The **spellchecker** 

is automatically turned on when you are typing your response. Any misspelled words will be underlined in the text just as in Microsoft Word. You can override the Spell Checker or run it by clicking on the Spell Check button on the top of the screen.

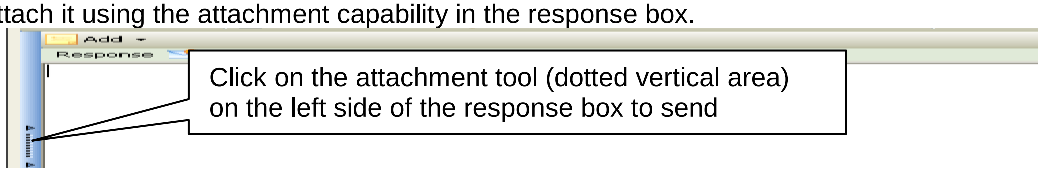
Please see the **Tools for Responders** section below for tools available for the response process.



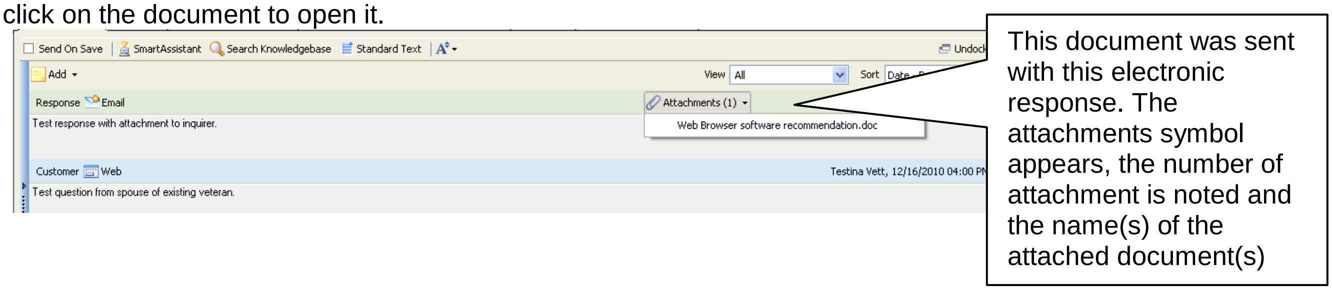
Privacy Rules: CAUTION: YOU MUST, IN ALL CASES, OBEY THE PRIVACY REQUIREMENTS THAT APPLY TO IRIS INQUIRY RESPONSES. Privacy Requirements for Responses: Although the IRIS operates on a Secure Socket Layer to protect the transmission of information into VA, the opposite is not true. Our electronic responses leave VA's secure environment via the Internet into un-secure territory since most of the public operates without the same protections that typically apply to commercial endeavors. VA cannot know if the inquirer is opening his/her response on his/her own computer, in a public library, or anywhere else. For this reason, **we may not include personal, identifying information in our responses (i.e., specific personal data from a medical record, Social Security numbers, bank account numbers, etc. until such time as we can authenticate and password veterans into the system to offer a higher level of protection to our IRIS electronic communications.)** If it is necessary to provide personal information in a response, you should respond to the inquirer by telling him/her that you must respond by phone or by surface mail with the desired information because of the personal nature of the desired response.

Attachments: Adding Attachments to Response; Adding Attachments for Internal Use

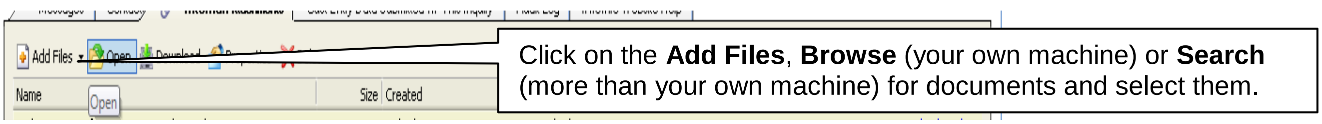
Add attachment to response If you need to add a document to send with your response, be sure to attach it using the attachment capability in the response box.



You will have a record of the document sent with the electronic response to the inquirer. You can click on the document to open it.

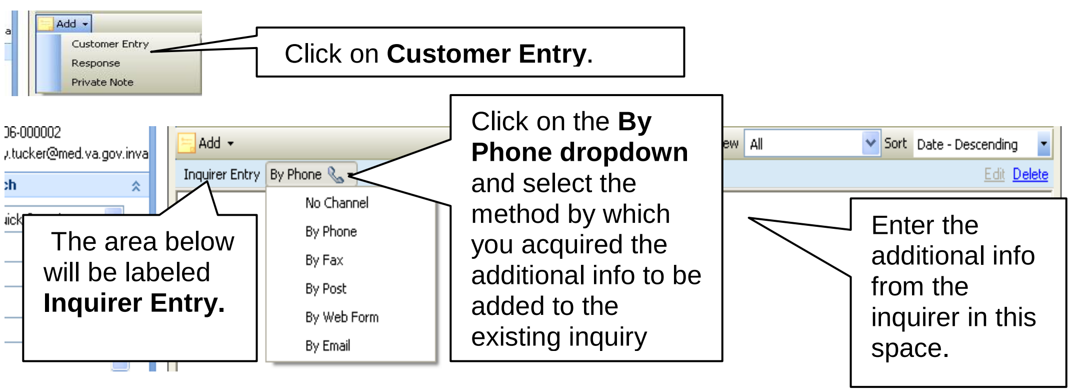


Add attachments for internal use If you need to attach documents for internal use, use the **Internal Attachments** tab. Once successfully attached, a paper clip icon will appear on the **Internal Attachments** tab.



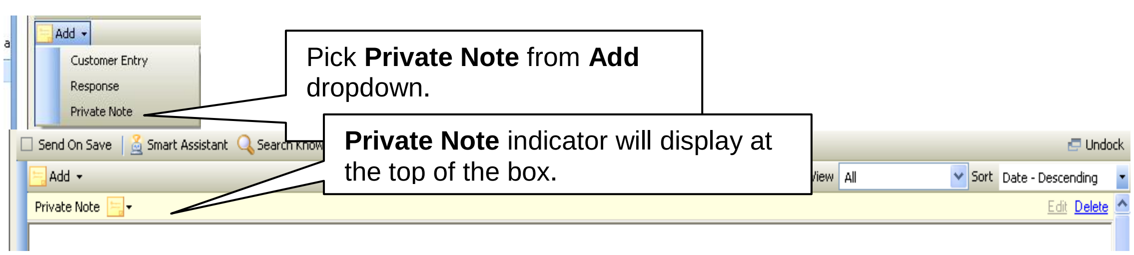
Add Additional Customer Entry (more questions/updates from inquirer) information **<u>to an existing inquiry</u>** based on additional contact with inquirer:

- Click on Customer Entry and then select the method by which you got this additional information from the inquirer. Then enter that information in the box.

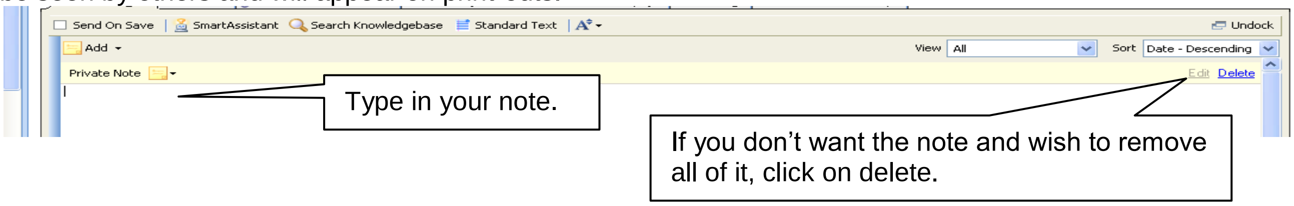


Add A Private Note

To add a **Private Note**, select **Private Note** from the **Add** dropdown. The **Private Note** indicator will show at the top of the entry box.

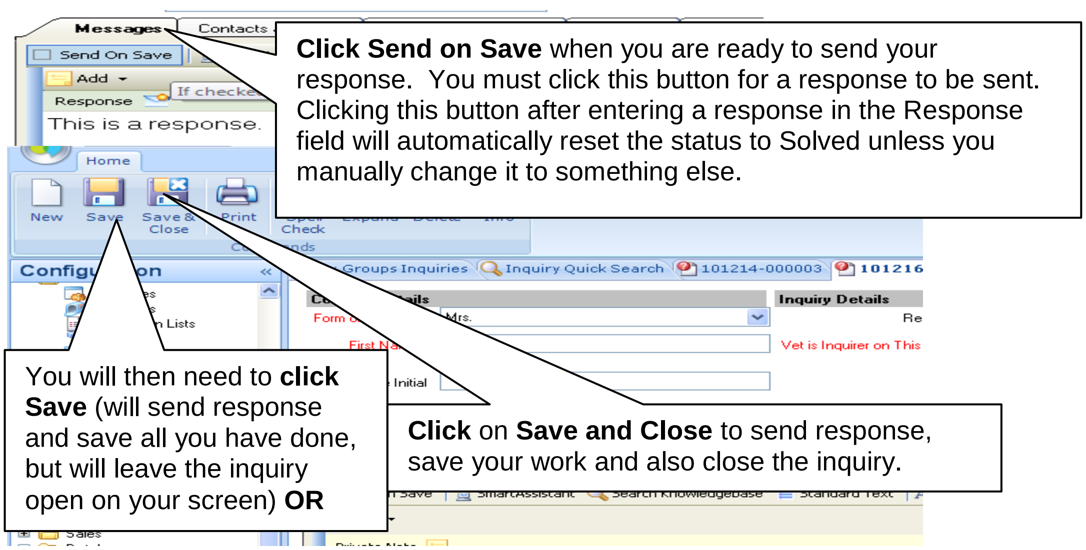


Type in your note; this note will not go outside of VA. It is internal only. ***However,*** *if the inquirer and/or veteran view a printed copy of the inquiry for any reason (i.e., FOIA request), all parts of the inquiry will display including private notes. Choose your words carefully.* If you decide not to retain the private note that you just typed in *but did not save*, you can use the delete button to remove it. Do NOT include any disrespectful or other inappropriate language in a private note. Private notes may be seen by others and will appear on print-outs.



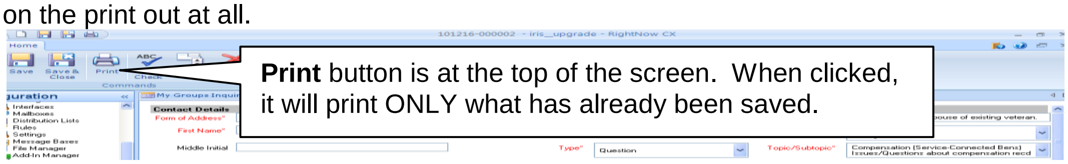
6. Once you have completed your response, you will need to do two things: **1**) click on **Send on Save** and then **2)** either **Save** or **Save and Close** it. When you are in Response mode, the **Send on Save** feature becomes available. You **must** check this box for the electronic response to be sent. When you have entered a response **AND** clicked **Send on Save**, the status field will automatically be set to **Solved** unless you manually reset it to something else.

Once **Send on Save** is clicked, the response will be sent as soon as you **Save** this inquiry, even if it remains open on your screen. You will then need to click **Save** (will send response and save all you have done, *but* will leave the inquiry open on your screen) or click on **Save and Close** which will send the response, save your work and also close the inquiry. **NOTE**: If you need a **printout** of the inquiry *that includes your response*, click **Save,** NOT **Save and Close.** Then do the print out for a complete copy and then **Close**.



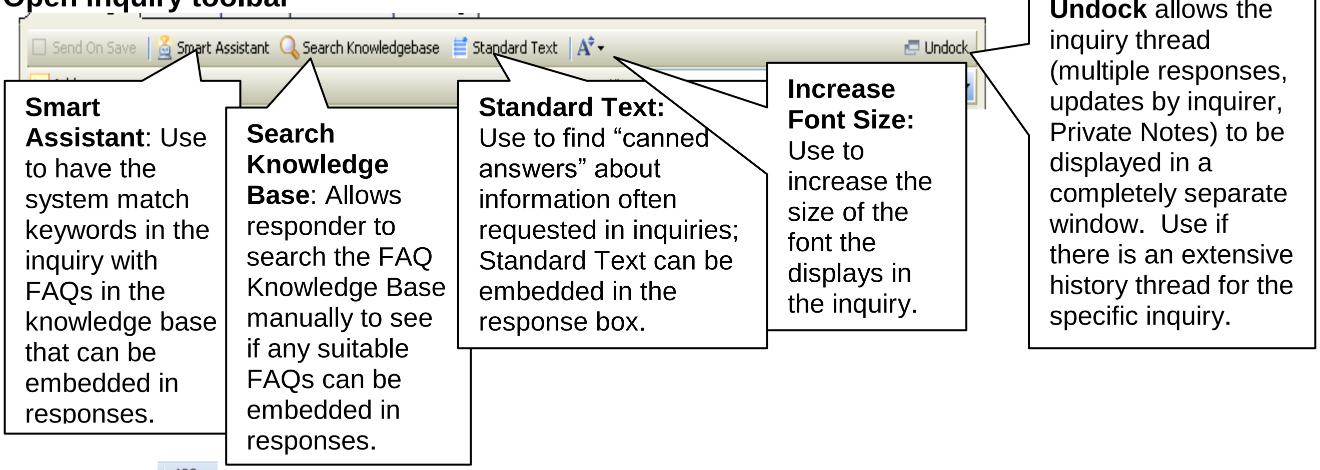
7. Print a copy of the inquiry that you're working on, if necessary

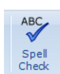
If you need a **printout** of the inquiry *that includes your response*, click **Save,** ***NOT*** **Save and Close.** Click **Save, Print** a complete copy and then click **Save and Close**. Any printout will ONLY contain information that is saved, so if you haven't saved the inquiry with the response, the system will only print the inquiry without the response. Some of the PII fields will not appear on a print copy if the field was not completed. For example, if a service number or claim number was not entered in their respective fields and are thus blank, neither the service number nor the claim number field will appear on the print out at all.



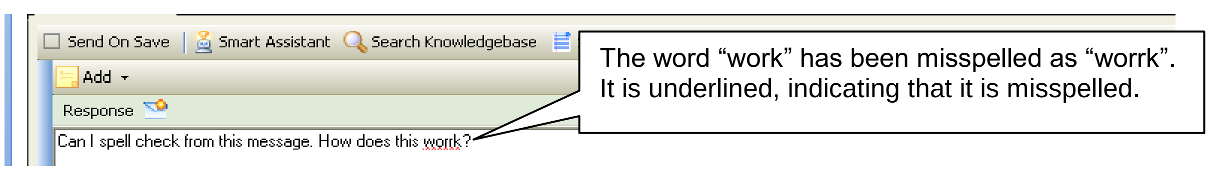
Tools for Responders: There are tools available for responders when an inquiry has been opened up that appear above the response box on the Open Inquiry Toolbar. They are:
Smart Assistant: Use to have the system match keywords in the inquiry with FAQs in the knowledge base that can be embedded in responses.
Search Knowledge Base: Allows responder to search the FAQ Knowledge Base manually to see if any suitable FAQs can be embedded in responses.
Standard Text: Use to find "canned answers" about information often requested in inquiries; Standard Text can be embedded in the response box.
Increase Font Size: Use to increase the size of the font that displays in the inquiry.
Undock allows the inquiry thread (multiple responses, updates by inquirer, Private Notes) to be displayed in a completely separate window. Use only if there is an extensive history thread for the specific inquiry.

Open inquiry toolbar

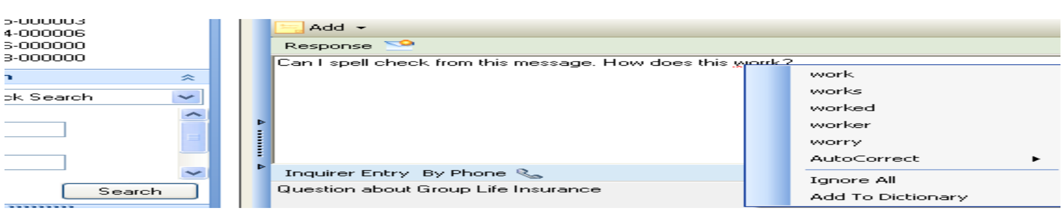


Spell Check 

The **Spell Check** function is automatically available when you are typing a response, a Private Note, and/or performing customer entry on behalf of inquirers. It works in the same way MS Word works by underlining the misspelled text when you type something incorrectly. You can control the spell check function on an open inquiry by using the **Spell Check** button on the top ribbon and can override it if necessary.



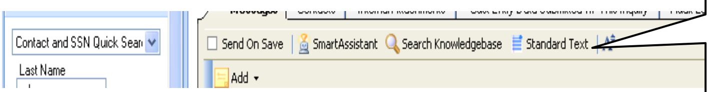
If the word is unlined as misspelled, **right-click on the word** and the **Spellcheck** dropdown will open with word possibilities, etc. Select what you need and click on it.



Standard Text and Hotkeys

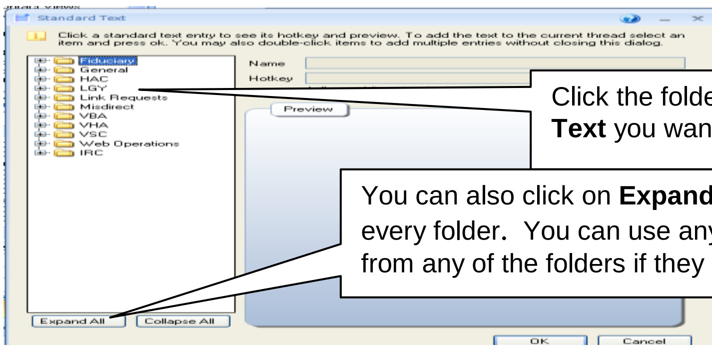
The IRIS contains a number of folders containing **Standard Text**. These are "canned" responses that can be used again and again because the inquiries received by any given mailgroup include the same questions on a regular basis. Responders can use any of the items in any folder if useful. Clicking on the desired **Standard Text** response will embed that canned in the response box. Once embedded, the **Standard Text** response can be edited, added to or removed. A complete inventory of all Standard Text responses including folder, label and content can be found at http://vaww,va,gov/irisinfo/irisguides.asp or accessed via **the IRISInfo Website Help tab**. **Note**: To add a **Standard Text** response to a folder, please contact the VA IRIS System Admin Group. That response must be appropriately vetted before it is sent to the IRIS Admins to post.

When you open an inquiry, the responder tools appear above the response box. If you wish to utilize a canned answer, click on the **Standard Text button** above the response box**.**



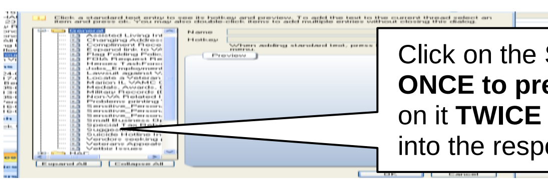
Standard Text button allows you to search, locate, and embed canned answers in responses.

Click on the folder that contains the **Standard Text** that you want to use**.** Find and open the folder, find the label for the Standard Text response you are looking for. **Click on it once to preview** the content and/or **click twice on it to embed it in the response box.**



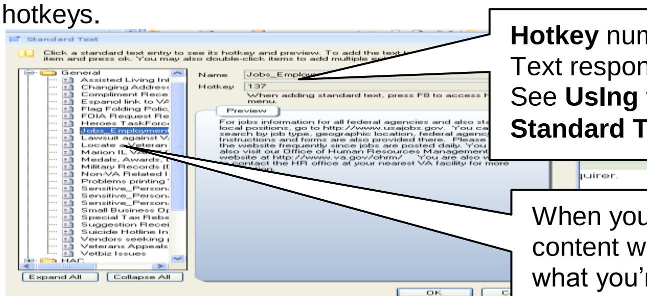
Click the folder that contains the **Standard Text** you want to display

You can also click on **Expand All** to list the content of every folder. You can use any canned responses from any of the folders if they are useful.



Click on the Standard Text Response **ONCE to preview** the content, or click on it **TWICE to embed** the response into the response field.

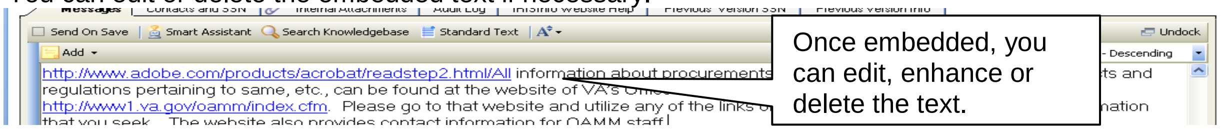
Preview a Standard Text Response and Find Hotkey Number
Click **ONCE to preview** the standard response and **TWICE to embed** the Standard Text in the response box. If in Preview mode and the response is acceptable, click **OK**. **NOTE**: You can edit or delete all or part of a Standard Text response once embedded in the response box.
To obtain the hotkey number, use the **Preview** function which displays the hotkey number as well as the contents of the Standard Text response. The **hotkey** number is a shortcut for using the same Standard Text response all the time simply by entering the ID number. Mailgroups that use them to answer the same questions over and over again find the hotkey shortcuts useful. See **UsIng the Internal Hotkey Number for embedding Standard Text in Responses** below to learn how to use hotkeys.



Hotkey number is a shortcut for using the same Standard Text responses all the time simply by entering the ID number. See **UsIng the Internal Hotkey Number for embedding Standard Text in Responses** below.

When you click the label of the Standard Text **ONCE**, the content will appear in the **Preview** screen. If the content is what you're looking for, **click okay** to embed in the response box. Otherwise click **cancel**.

You can edit or delete the embedded text if necessary.

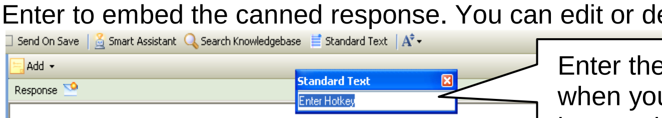


Once embedded, you can edit, enhance or delete the text.

UsIng the Internal Hotkey Number for embedding Standard Text in Responses

What is a Standard Text hotkey? A hotkey is a shortcut button that asks for the internal ID number of a Standard Text response. When the internal ID number is entered, the corresponding Standard Text response is embedded in the response box.
How do you find a hotkey ID number? *You must first find the Standard Text item in the Preview mode to determine its internal ID number.* (Click on the desired Standard Text item ONCE to see a preview of the content and find the hotkey number.)

If you know the internal hotkey number of the Standard Text response that you use all the time, you can use a shortcut using the **F8** key on your keyboard. Put your cursor into the response box and click on the F8 key. A box will open up asking for the internal number. Enter the number and click on Enter to embed the canned response. You can edit or delete it if necessary.

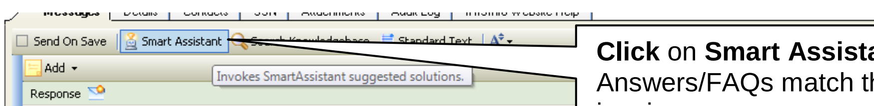


Enter the internal hot key number into the box that opens up when you click on the **F8** key while your cursor is the response box, and click on the Enter key. The response will embed in the response box and can be edited or deleted as necessary.

Smart Assistant (Key Word Match with existing Answers/FAQs)

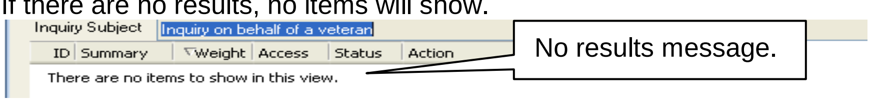
Smart Assistant will return any FAQs that match any of the keywords in the inquiry. If any existing Answers/FAQs can be in used as a response or included in a response, you can add the text or the link to the text in the response box by clicking on the action to the right of the Answer/FAQ that you want. If this is an Answer/FAQ that you will use with great frequency, make note of the **ID** number to use the hotkey function.

When you are working in the response box of an open inquiry, you can click on **Smart Assistant** to see if any keywords exist in the inquiry that match an Answer/FAQ and, if there are any results to that keyword search, you can determine which Answer/FAQ it is and what its number is.



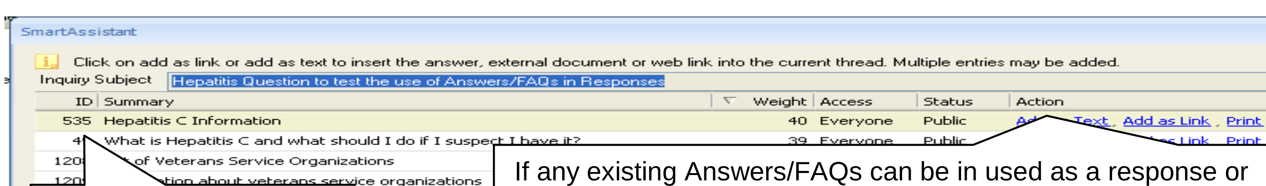
Click on **Smart Assistant** to see if any Answers/FAQs match the keywords in the inquiry.

If there are no results, no items will show.



No results message.

If any matches to keywords are found, results will be shown as line items. You can click on any of them to see full content of that item. You will see the internal ID number on the left-hand column of the line item. If selected, you can embed as Text or as a Link in the response box.

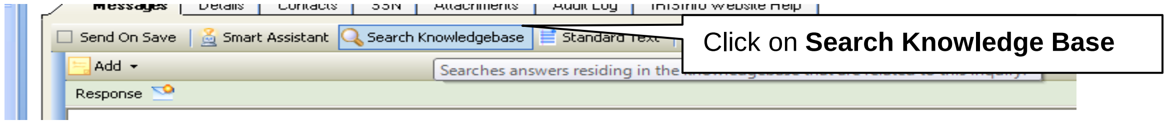


Answer/FAQ internal **ID** number

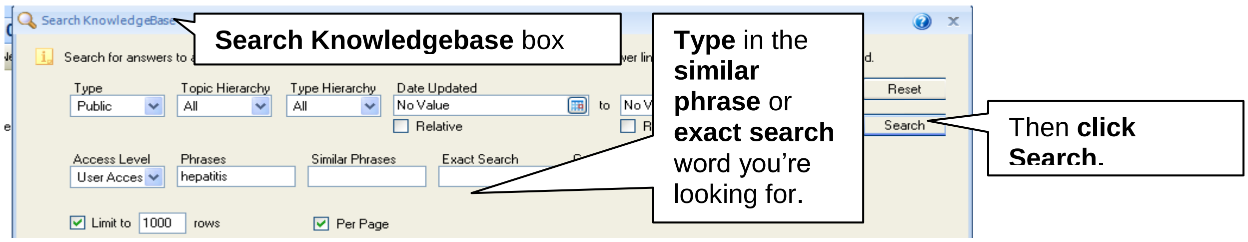
If any existing Answers/FAQs can be in used as a response or included in a response, you can embed the text or the link to the text in the response box by clicking on the **Action** link

Search Knowledge Base: Search Answers/FAQs manually and hotkeys

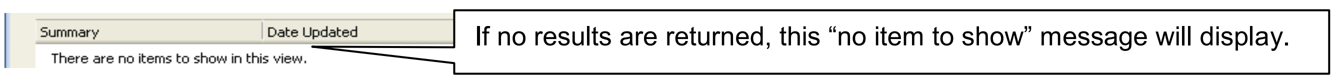
Search Knowledgebase can be used when you are working in the response box of an open inquiry. You can click on **Search Knowledgebase** to find an Answer/FAQ yourself.



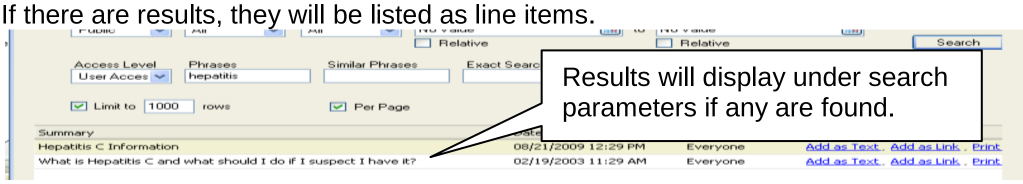
In the **Search Knowledgebase** box that opens, type in the word or phrase you're looking for by typing in the **similar phrase** or **exact search** word you're looking for and then click **Search.**



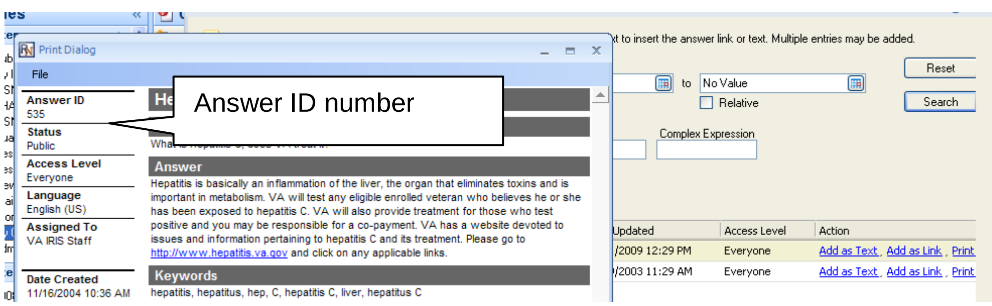
If there are no results, the screen will say "There are no items to show in this view".



If there are results, they will be listed as line items.



You must open the Answer/FAQ by double clicking on it to preview the content of the Answer/FAQ and to determine its **Answer ID number**.

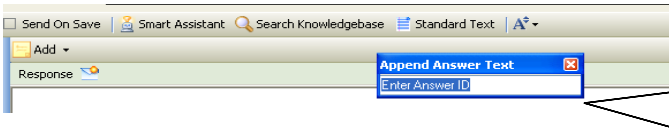


Using the Internal Hotkey Numbers for Answers/FAQs

What is a hotkey? A hotkey is a button that asks for the internal Answer ID number of an Answer/FAQ and then embeds that Answer/FAQ in the response box.

How do you find a hotkey ID number? *You must first find the Answer/FAQ to determine its internal ID number.* See above.

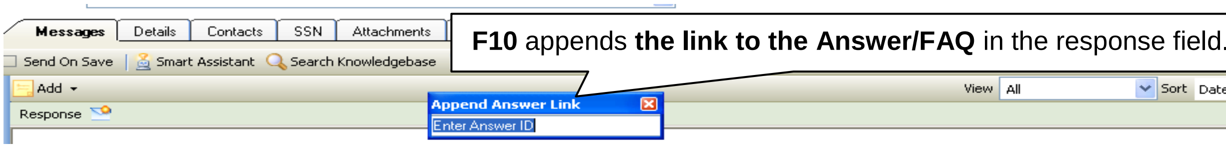
If you know the answer ID to append, put your cursor into the response box and use the **F9 key to append the FAQ text** (preferred method), enter the answer ID number and then click **Enter.**



F9 embeds the Answer/FAQ **text** to the response field. Once embedded, you can edit the text in any way you see fit, or you can delete it if you decide not to use it.

OR

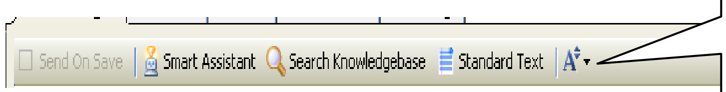
use the F10 key to append a link to that Answer/FAQ in the response box. In the pop-up window, enter the answer ID and click **Enter**.



F10 appends **the link to the Answer/FAQ** in the response field.

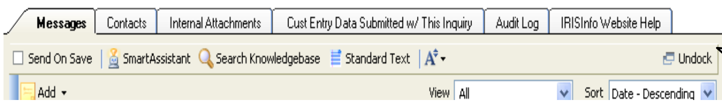
Change Font Size

This function will change the font size of the inquiry thread text or anything you type into Response, Inquiry Content and/or Private Note to make it easier to read.

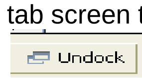


Change font size of the inquiry thread text.

Undock

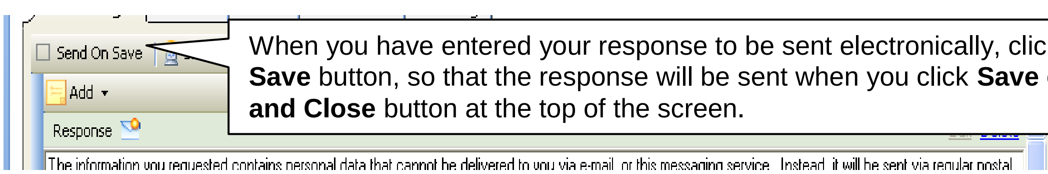


Clicking on undock will expand the message tab screen to see a lengthy message history.



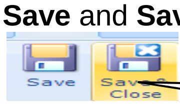
Send on Save, Save and Save and Close Buttons

Click **Send on Save** when response is entered so that the electronic response will be sent (*inquirer must have an email address and request an electronic response*). If this button is not checked, the inquirer will not receive anything when you **Save** or **Save and Close**.



When you have entered your response to be sent electronically, click the **Send on Save** button, so that the response will be sent when you click **Save** or click **Save and Close** button at the top of the screen.

Save and **Save and Close buttons on the ribbon at the top of the screen**



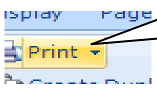
Save saves your work but leaves the inquiry open on your screen.
Save and Close saves your work *and also closes* the inquiry.

Print an Opened Inquiry- A Two Step Process

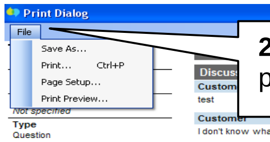
You must 1) select **Print** using the **Print** button; this will give you a print preview of the printout. You must then 2) click on File>Print on the upper left hand corner as follows:

To print an opened inquiry, use the **Print** button at the top of the inquiry. NOTE: The printout will include ONLY the data that has been **Saved** in the inquiry. If you have typed in a response but

haven't saved it, the print will not show the response. Clicking on the **Print** button will display a preview of the printout.
NOTE: If the inquiry does NOT involve a dependent, the dependent information fields will not display.



1. Click the **Print** button on the ribbon at the top of the inquiry. A print preview will display. The printout will include ONLY the data that has been **Saved** in the inquiry. **Note:** unfilled PII fields will not display on the print copy; i.e., if no service number was entered, the service number field will not appear on the print out.



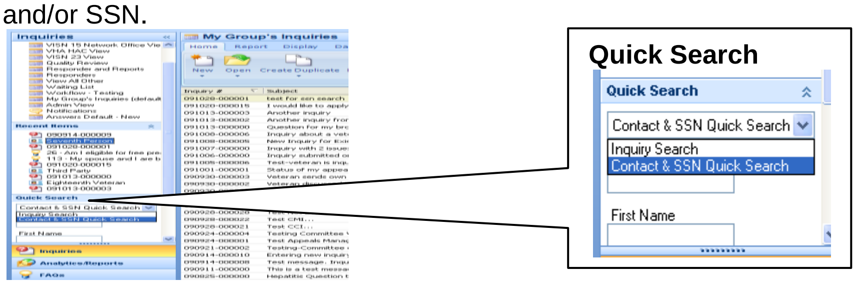
2. Click **File** on the upper left and then click Print to produce the paper print out.

Searching for Inquiries: Three Methods

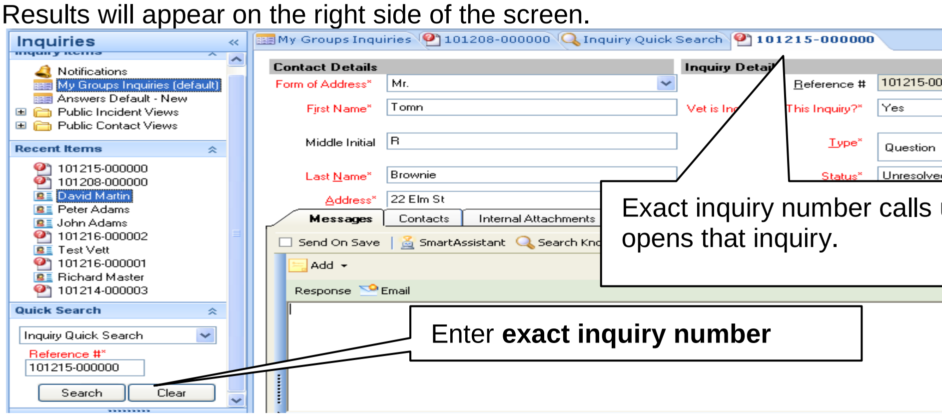
The Three Search Methods: There are three search methods to find a particular inquiry or a particular contact (inquirer, veteran or other contact). They are:

1. **Quick Search** using inquiry number, last name and/or first name and/or middle initial and/or email address, and/or the SSN
2. **Search** by choosing more parameters
3. **Wildcard search** using partial data and the % (percent key or using the * star/asterisk wildcard for phone numbers.

1. Using Quick Search on the left navigation pane—Search for a specific inquiry by its full inquiry reference number, or by contact data (last name and/or first name and/or email address and/or SSN.



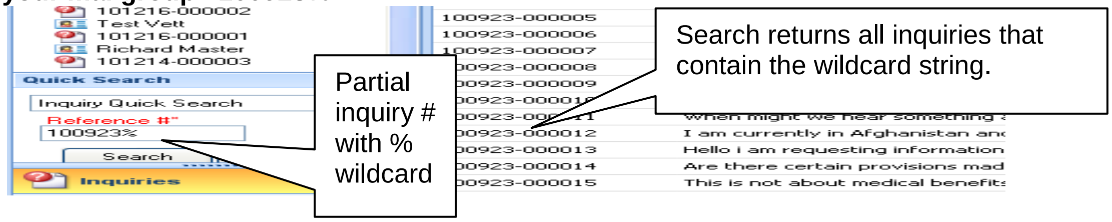
If you select **Inquiry Search** from the **Quick Search** dropdown, the fillable **Inquiry #** field will appear. You must enter the entire inquiry reference number or a partial string with the % wildcard function. Results will appear on the right side of the screen.



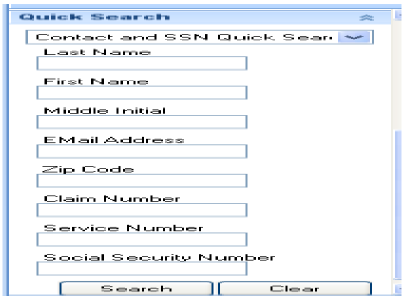
Exact inquiry number calls up and opens that inquiry.

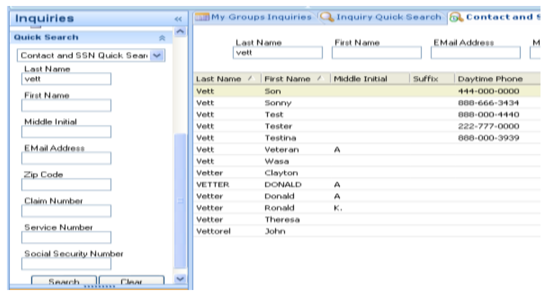
Enter **exact inquiry number**

Wildcard inquiry number search: (Example is all inquires dated Sep 23, 2010 assisgned ot your mailgroup   100923%



If you select **Contact & SSN Quick Search** from the **Quick Search** dropdown, the fillable fields for **Last Name**, **First Name** and **Middle Initial**, **Email, Service #, Claim #** and **SSN** will appear. You can fill in one or more of the fields. Results will appear on the right side of the screen.

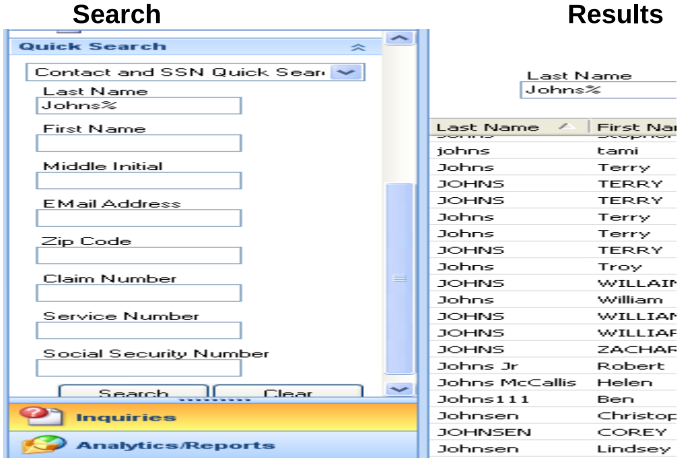




Wildcard Search by Contact & SSN Quick Search

Search string: (example: all contacts whose last name begins with "Johns"; enter Johns%)

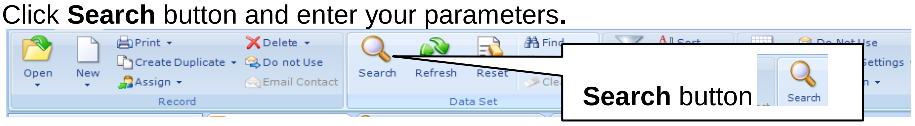
Search **Results**

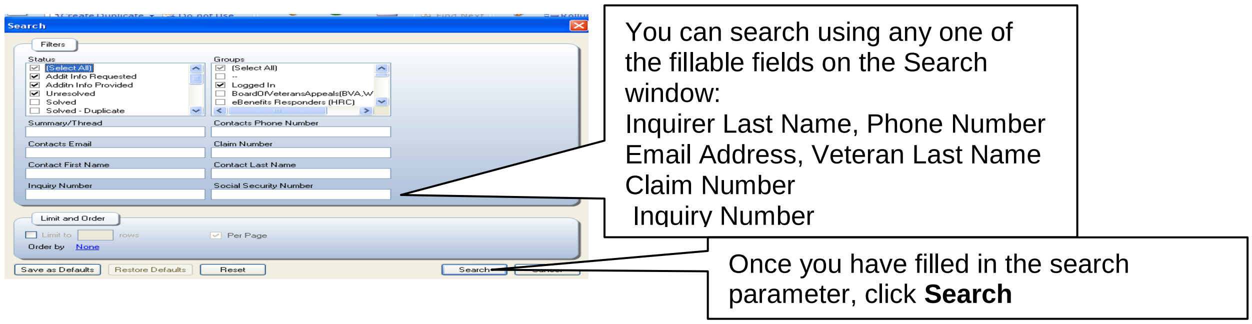


2. Search by choosing parameters: Find an Inquiry or Inquirer or Navigate to Solved Inquiries

You can enter a search term(s) in the fillable fields to find an inquiry or group of inquiries. You can search using any one of the fillable fields on the Search window: Inquirer Last Name, Phone Number, Email Address, Last Name, First Name, Claim Number. Service Number, or Inquiry Number. You can also search multiple mailgroups. *You also use this function to navigate to your Solved inquiries.*

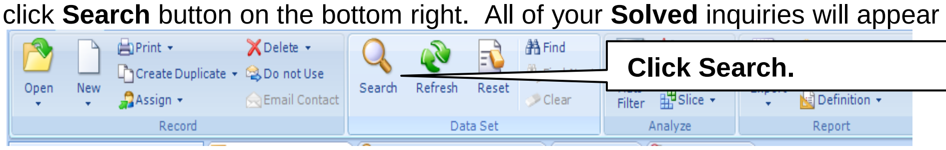
Click **Search** button and enter your parameters**.**

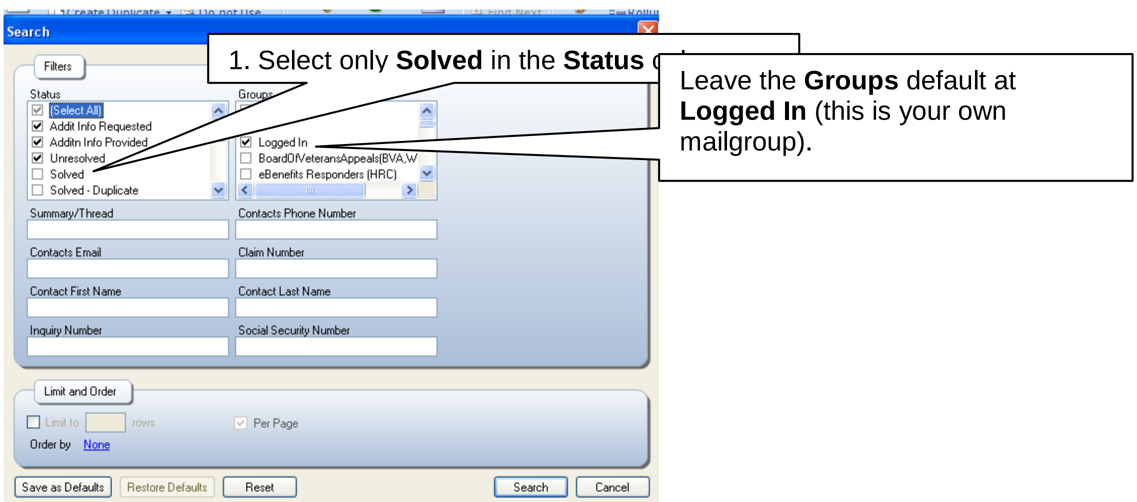




Navigate to Solved Inquiries

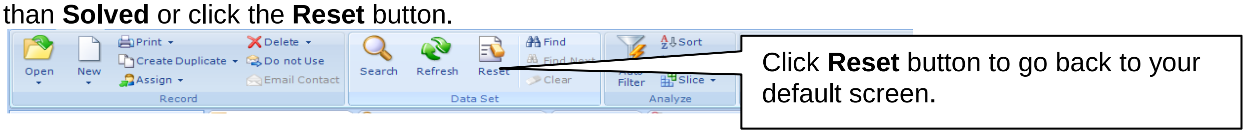
To navigate to your Solved inquiries, click on the **Search** button**,** select **Solved** in the **Status** field of the Search box. Leave the **Groups** default at **Logged In** (this is your own mailgroup) and then click **Search** button on the bottom right. All of your **Solved** inquiries will appear on the screen.





Results will display all **Solved** **i**nquiries **for your mail group for the last six months.** Once inquiries are in **Solved** status for more than six months with no activity, they are archived and then purged from the system after 19 months.

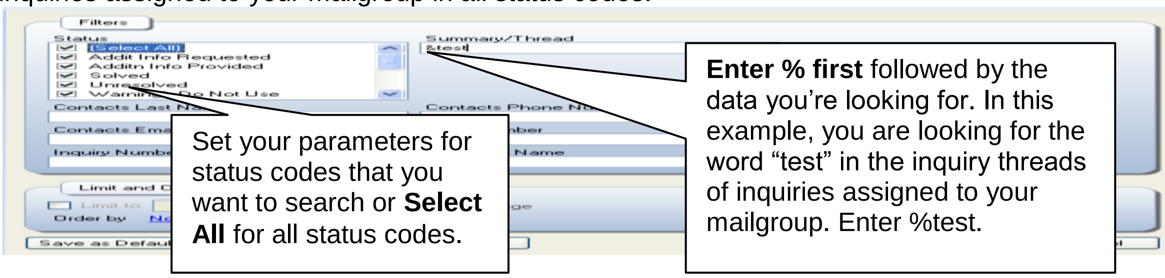
To navigate back to your open inquiries, perform the same steps, clicking the status codes other than **Solved** or click the **Reset** button.



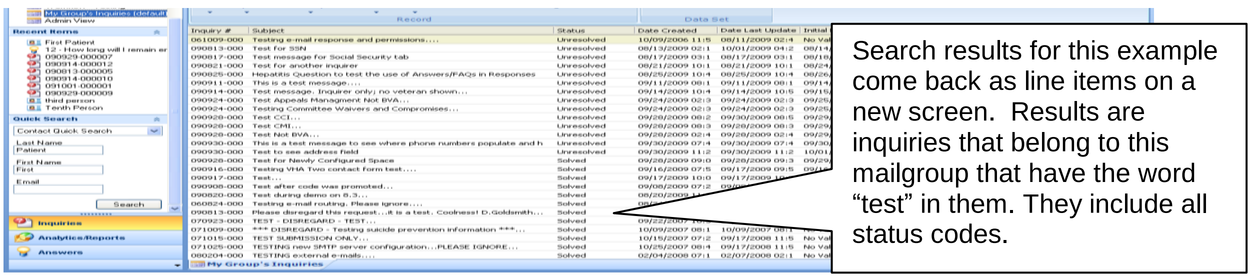
3. Wildcard Search

You can search for an inquiry that belongs to your mailgroup with only a partial name, partial claim number, partial summary string, etc. by using the percent % character (uppercase on the 5 button).. You set the parameters for status codes that you want to search (Solved only, All Status Codes, etc. and then fill the specific search field. For example, if you want to find all the inquiries with the word "test", you would enter %test in the Summary field. See screen shot.

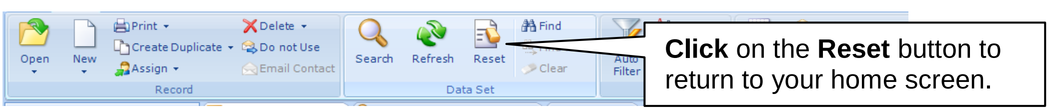
Set Wildcard Parameters
Enter the status code parameter that you want searched and then **enter %** followed by the data you're looking for. In this example, you are looking for the word "test" in the inquiry threads of all inquiries assigned to your mailgroup in all status codes.



Search Results Screen
Search results for this example come back as line items on a new screen. The search results are all of the inquiries belonging to this mailgroup that have the word "test" in them and includes all status codes.



Reset will clear the search results and return to the Inquiry Console Screen after your Search is completed. Click on the **Reset** button and wait a moment for the screen to refresh.

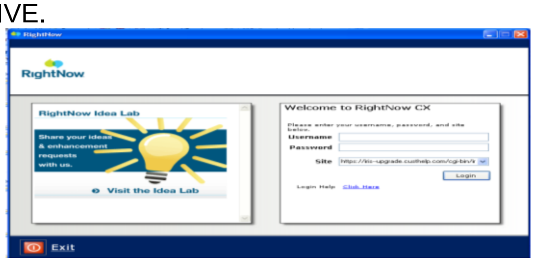


Summary of Steps to Take Action on an Inquiry

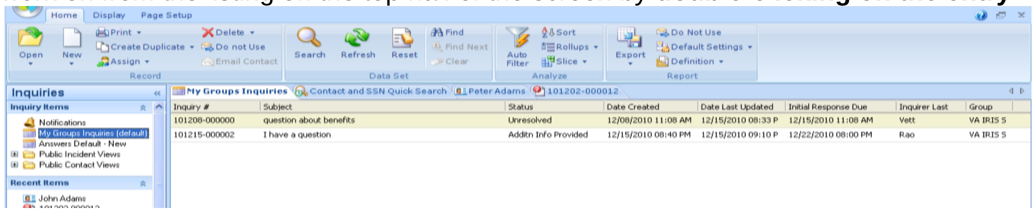
(For full description and use of each button/function, please see earlier pages with descriptions of each individual button.)

There is a specific order of actions that need to be taken for the IRIS to perform properly. Be sure you take all the necessary steps in the proper order as follows:

1. Go to the IRIS login screen and enter your access codes. REMEMBER THAT ACCESS CODES ARE CASE SENSITIVE.



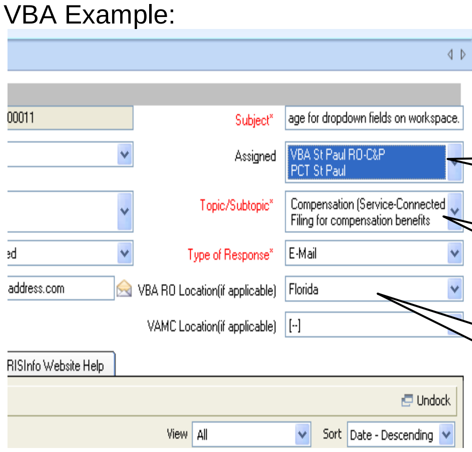
2. You should go directly to the **My Group's Inquiries** screen. **Select** the inquiry that you want to work on from the listing on the top half of the screen by **double-clicking on the entry.**



3. After opening and reading the inquiry, **determine if it correctly belongs to your mailgroup. If not:**

- 1) reassign it promptly by choosing the correct assignment location from the dropdown box. Mail groups appear in alphabetical order as they appear. All VA organizations begin with VA, NCA organizations begin with NCA, all VBA locations begin with VBA, VHA with VHA, etc. For a complete description of mail groups and their service areas, etc., go to http://vaww.va.gov/irisinfo/irisguides.asp and check the IRIS Participants Dropdown Listing document (use Control F to search the document).Select the correct destination from the dropdown list in the Assigned dropdown box.
- 2) If the Topic and Subtopic in the field below are not compatible with the mailgroup to which you must reassign the inquiry, change it to the correct Topic and Subtopic prior to reassigning. If the Topic and Subtopic are related to some VBA functions or to a specific medical facility, you may have to fill out the applicable RO or VAMC locations fields using the dropdown selections. **NOTE: Not all Topics/Subtopics require the use of the Location fields.** Entries coming from the website will have these fields completed already. Examples:

VBA Example:

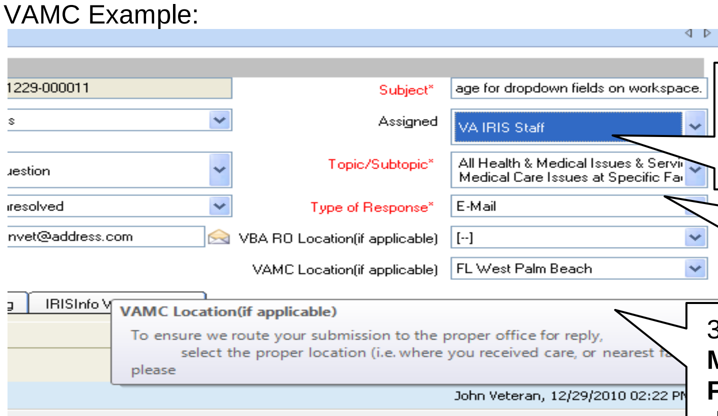


1) Use **Assigned** dropdown to find and select correct mailgroup and subset of that mailgroup.

2) Correct the **Topic and Subtopic** to ensure compatibility with the mailgroup of reassignment if necessary

3) If the Topic/Subtopic is **Compensation**,, pertaining to **Filing for Benefits**, select the RO location from the dropdown.

VAMC Example:

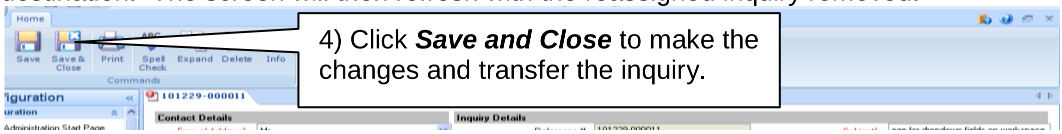


1) Use **Assigned** dropdown to find and select correct mailgroup and subset of that mailgroup.

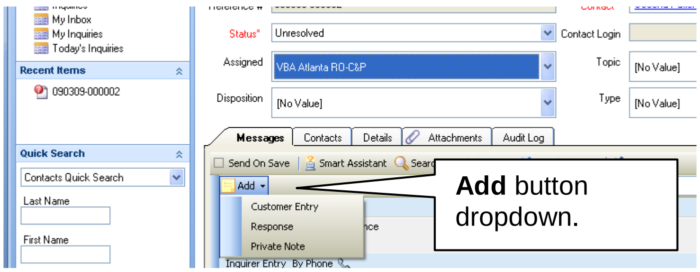
2) Correct the **Topic and Subtopic** to ensure compatibility with the mailgroup of reassignment if necessary

3) If the Topic/Subtopic is **All Health & Medical**, pertaining to a **Specific Facility**, select the VAMC from the dropdown.

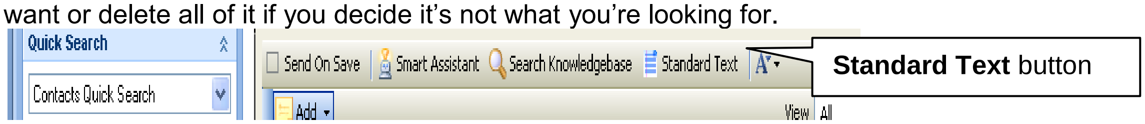
4) Click **Save and Close**. This will transfer the jurisdiction of the inquiry to the new destination. The screen will then refresh with the reassigned inquiry removed.



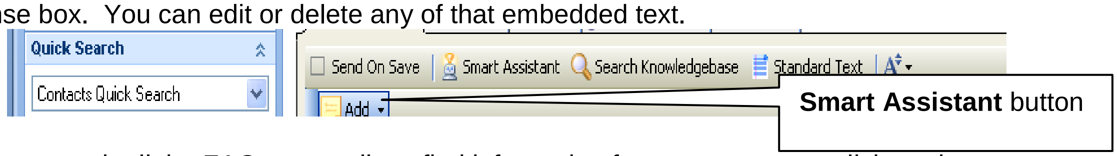
5. To add a response and/or internal note, **click** the **Add** button and enter the **Response** and/or **Private Note**. You can use Standard Text or an FAQ as your response or in addition to your response. If you've done all the steps that apply to this inquiry, click **Send on Save** to send the response and click **Save and Close**. If you aren't done, use the following steps.



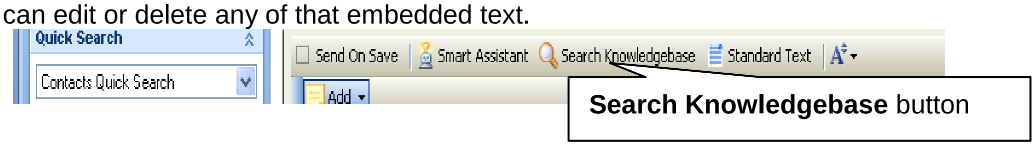
- If you wish to insert a pre-written answer, **click** on the **Standard Text** button to access the pre-written answers. If you find the one you want, click on it and the answer text will automatically insert into the response box. You can edit that response in any way that you want or delete all of it if you decide it's not what you're looking for.



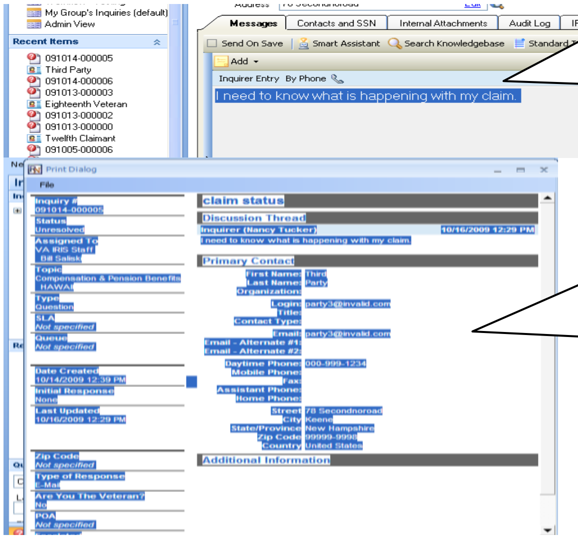
- If you want the IRIS to suggest a response based on keywords found in the inquiry that match an FAQ, **click** on the **Smart Assistant** button. A list of any result will appear on the screen and you can select any of them that you find suitable and embed the text in the response box. You can edit or delete any of that embedded text.



- If want to search all the FAQs manually to find information for your response, click on the **Search Knowledgebase** button and you can manually go through the FAQs to find what may be useful to you. If an FAQ will work, you can click on it and embed it in the response box. You can edit or delete any of that embedded text.



- **If you need assistance from someone not in the IRIS** to be able to respond to the inquiry, you will need to
    - **Request assistance via regular Outlook email**. If you need to include personal information from the inquiry, you **must encrypt** the email message. If you need to copy inquiry content, highlight the content to be copied, click on **Control+C** to copy and then paste into the email message using the paste function or **Control+V**. **NOTE**: If you want the email message recipient to see everything, click on the **Print** button to get a preview of all the inquiry data and do a **Control+A** to highlight everything. Then do **Control+C** and then **Control+V** to paste into the email message.

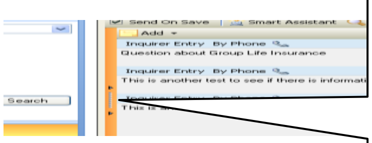


Open a new Outlook email. **Highlight** the data to be copied. **Do Control+C** to **copy** and then **paste** the data into your email message. If any personal information is copied, you **MUST** use **encryption.**

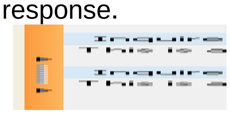
If you want the email message recipient to see everything, **click** on the **Print** button to get a preview of all the inquiry data and do a **Control+A** to highlight everything. Then do **Control+C** and then **Control+V** into the email message.

- **Reset** the **status** of the inquiry to **Additional Information Requested or other suitable status code**—(**NOT** Solved or Solved-Duplicate) so that the inquiry stays on the Open Inquiry Console until you are able to reopen it and answer it. If you change to Solved or Solved-Duplicate, it will be moved to another basket and you won't be able to find. It.
- **Enter a Private Note** annotating the request you are making for additional information
- **Click Save** or **Save and Close unless** you want to **attach documents.**

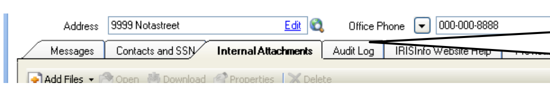
6. a To attach documents to an inquiry: You can attach VA files and documents to your response that is sent to the inquirer. You can also attach files for internal use only. Click on the dotted vertical lines on the margin at the left of the response field.



Click between arrows on left side margin to attach documents to the response.



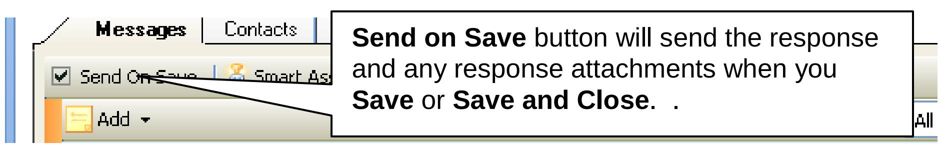
b. To attach documents for internal use only, click on the **Internal Attachments** tab and attach any documents using the **Add** button. When an attachment is added for internal use, the paperclip symbol will appear on the **Internal Attachments** tab label.



Click on Internal Attachments tab to attach documents for internal use.

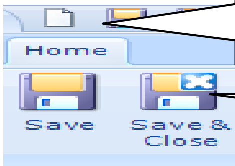
7. Click the **Send on Save** box at the bottom of the screen once you have typed in a response. This box is automatically checked if you add documents to send with the response.

.



Send on Save button will send the response and any response attachments when you **Save** or **Save and Close**. .

8. To complete the inquiry activities, **click** on **Save** to send the response and record your actions and leave it open on your screen, **OR click** the **Save and Close** button to send the response, record your activities and also close the inquiry. **If you want to print a copy of the inquiry *that includes your response***, **click** on **Save** to save your work including the response and leave the inquiry open on your screen, then **Print**, and then **Save and Close.** *If you* **Save and Close** *and subsequently decide to print the inquiry, you will have to navigate to your **Solved** basket to retrieve it or call it back from your **Recent Items** list on the left navigation pane and then print it.*



Save will record what you did and send an electronic response if you entered one (provided **Send on Save** is clicked) but will **not** close the inquiry. **When the inquiry is still open on your screen**, you can **click PrInt** and everything that has been saved to the system, including your response will print.

Save and Close will save all transactions and close the inquiry. When the inquiry is set to **Solved** it will move to your mailgroup's **solved** basket.

Multi-select: Performing an identical action on more than one inquiry at a time

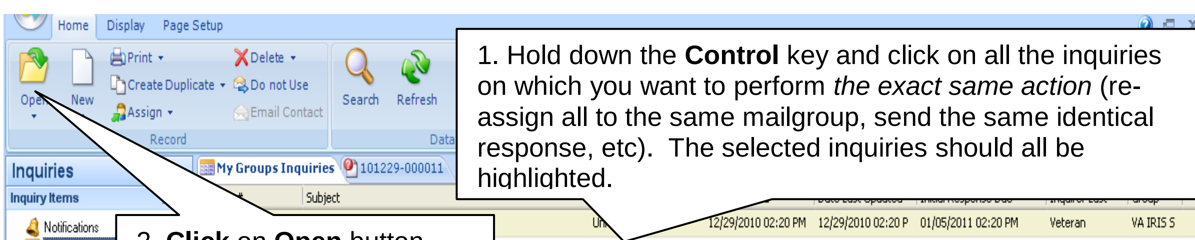
The Multi-select feature allows you to take an **identical** action on more than one inquiry at one time rather than performing the same action on each inquiry individually (exact same response, exact same reassignment, etc.). *This feature is most often used on duplicate inquiries from website visitors; see section on **Duplicate Inquiries** below.*

Examples of its use:

- If VA has recently released a news item that causes you to receive a large number of inquiries about the news item, you may wish to send the same response to all of them. Using multi-select, you can write one response and then respond to all the inquiries at once.
- If you receive a number of inquiries that belong to another mailgroup, you can reassign all selected inquiries to the same routing destination.

To use this feature, do the following:

1. **Press the Ctrl key while selecting each inquiry so that they are all highlighted.** (Background highlighting is very pale.)
2. **Click on the Open button** when you have highlighted the selected inquiries.

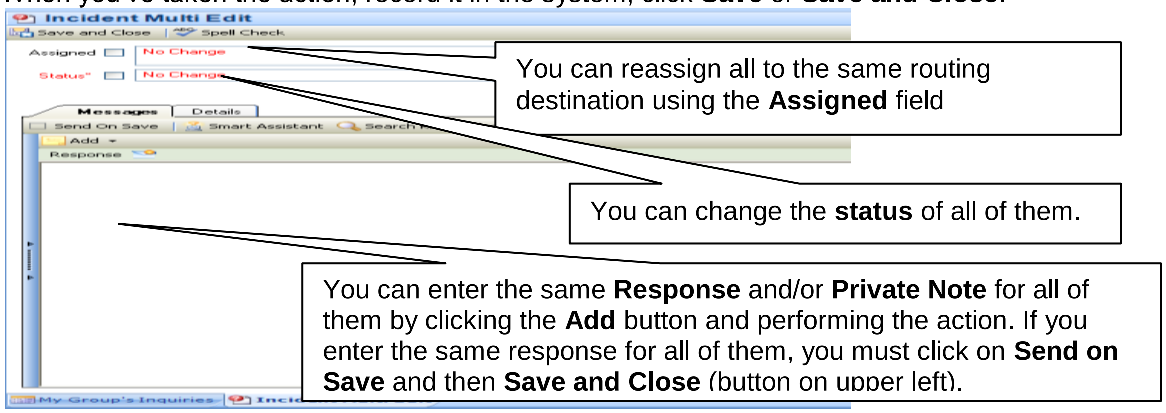


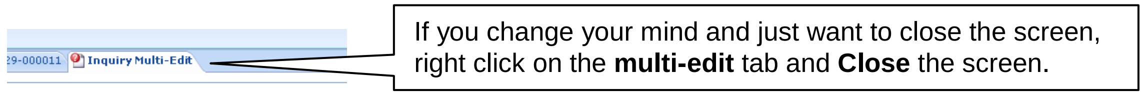
1. Hold down the **Control** key and click on all the inquiries on which you want to perform *the exact same action* (re-assign all to the same mailgroup, send the same identical response, etc). The selected inquiries should all be highlighted.

2. **Click** on **Open** button.

3. The **Multi Select** screen will open up that will allow you to perform the same activity on all of them. Both the box label and the tab at the bottom say **Incident Multi Edit**. You can do any of the following:
   - You can reassign all to the same routing destination using the **Assigned** field
   - You can change the **status** of all of them.
   - You can enter the same **Response** and/or **Private Note** for all of them by clicking the **Add** button and performing the action. If you enter a response**, you must click on Send on Save.** (button on upper left of response box).

- When you've taken the action, record it in the system, click **Save** or **Save and Close**.





Duplicate Inquiries: Duplicates can be created in two ways:
1) by inquirers (repeated copies of the same inquiry go to the same mailgroup) or
2) by VA staff who purposely create duplicates when a single inquiry addresses multiple issues that must be addressed by more than one mailgroup. (subject line says "copy of" at the beginning of the subject line.)

Duplicate Inquiries Received from the inquirer

Duplicate inquiries are caused when the inquirer repeatedly clicks the submit button at the end of the IRIS customer form. Although the instructions specifically say to click the button just one time, some inquirers do it anyway. Every time they push the button, another inquiry is created. When this occurs**, answer one of the inquiries** as you normally would. Manually set the status code of the duplicates to "**Solved-Duplicate**" and then **Save**. .This will close out the duplicates. Note: If there are numerous duplicates, use the **Multi-Edit function** to set them all to **Solved-Duplicate** status in one action To deal with all the duplicates of a given inquiry, follow these steps:

1. Select one of the duplicates and take all necessary steps to answer it.
2. If there is just one duplicate of the original inquiry, **open** it, set **status** to **Solved-Duplicate** and then **Save and Close**.
3. If there is more than one duplicate, **select** all of the remaining duplicates by holding down the **Control** key as you click on all of the duplicate inquiries to highlight them.
4. **Right click** and select **Open** and then **Inquiry**.
5. **Manually** set the **status** code to **Solved Duplicate**.
6. **Click Save and Close**.

Creating Duplicate Inquiries; create a duplicate when more than one mailgroup needs to address multiple issues in an inquiry

When you receive an inquiry with multiple issues, some of which correctly belong to other mailgroups, you can create duplicates. For example, an inquirer submits one inquiry asks about 1) the amount of his compensation and 2) asks about the care he received at a specific medical facility, Assume the inquiry was sent to the correct Comp & Pen office. They would keep jurisdiction of the original inquiry and then create a duplicate to send to the specific medical facility to address the medical issue. *You can repeat this process to create more than one duplicate if the original inquiry contains multiple issues needing to be sent to multiple locations for responses.*

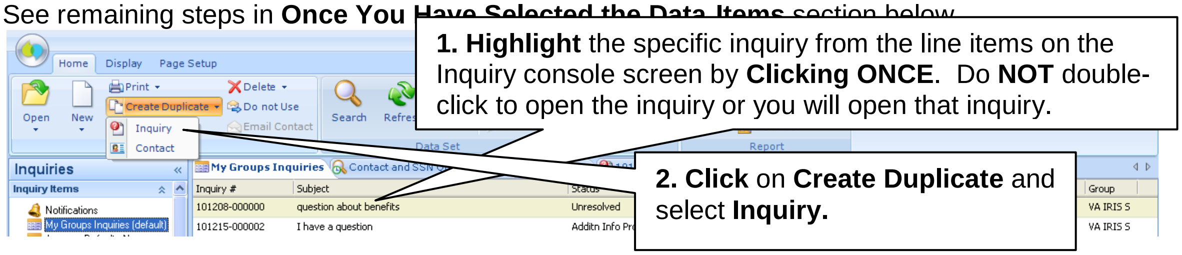
You can initiate this function in one of two ways: (see instructions and screenshots of each method below)

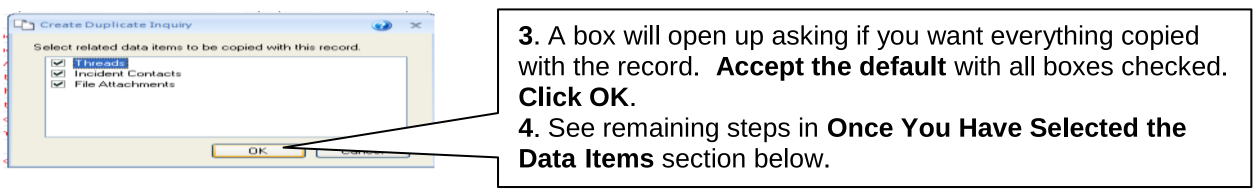
1. Unopened inquiry from My Group's Inquiries screen. Inquiry to be duplicated is highlighted on the inquiry listings on the home screen; double-click on **Create Duplicate** button or single click and choose Inquiry. Do **NOT** create a duplicate Contact.

2. Inquiry is open; go to **Contacts and Inquiry History tabs.** Click on **Contacts** tab *and then* on **Inquiry History for Inquirer subtab**. Click on **Create Duplicate** button *on the* ***Inquiry History for Inquirer subtab***, **NOT on the Contacts subtab.** If you create and save a duplicate contact record, contact the VA IRIS System Admin Group to fix it immediately.

<u>**Unopened**</u> **Inquiry from My Group's Inquiries screen.** If you know which inquiry needs to be duplicated **without opening it up:**

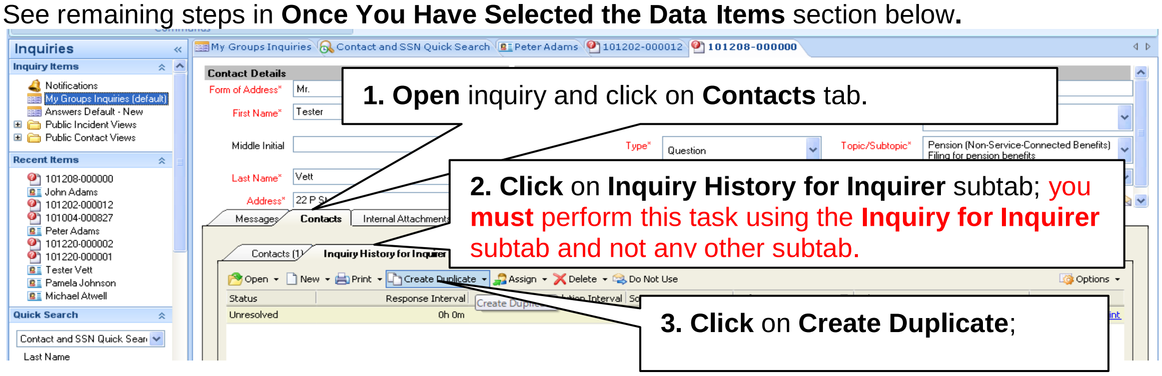
1. **Highlight** the inquiry from the line items by clicking **ONCE**. Do **NOT** double-click to open the inquiry.
2. Click on **Create Duplicate** and select **Inquiry.**
3. A box will open up asking if you want everything copied with the record. Accept all and Click **OK**.
4. See remaining steps in **Once You Have Selected the Data Items** section below.

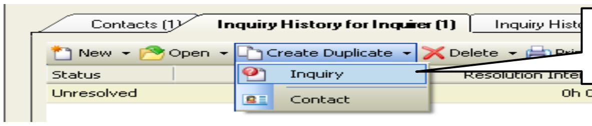




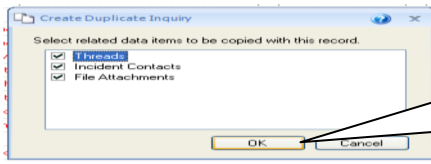
<u>Inquiry is open; use Contacts tab</u> and Inquiry History subtab

1. **Open** the inquiry, click on the **Contacts** tab,
2. **Click** on the **Inquiry History for Inquirer subtab**; you **must** perform this task using the **Inquiry History for Inquirer** subtab and not any other subtab.
3. **Click** on **Create Duplicate**.
4. **Click** on **Inquiry**
5. A box will open up asking if you want everything copies to the duplicate. **Accept** all the selected boxes and **click OK**.
6. See remaining steps in **Once You Have Selected the Data Items** section below.



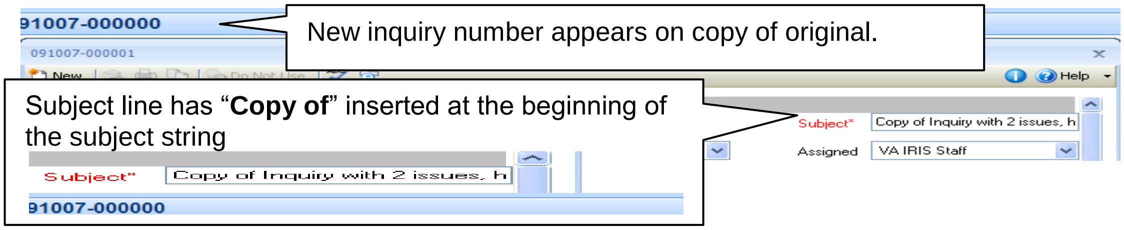


4. Click on **Inquiry**.



5. A box will open up asking if you want everything copied with the record. Make sure all the boxes are selected and then click **OK**.
6. See remaining steps in **Once You Have Selected the Data Items** section below**.**

Once You Have Selected the Data Items using either of the two methods (unopened inquiry and opened inquiries), a new screen will open up with all the information duplicated and with a new inquiry number. Note that the subject line starts with **"Copy of"** followed by the original subject line**. Whenever the subject line begins with "Copy of", it means you are looking at duplicate inquiry created by a VA IRIS user from inside the system.**

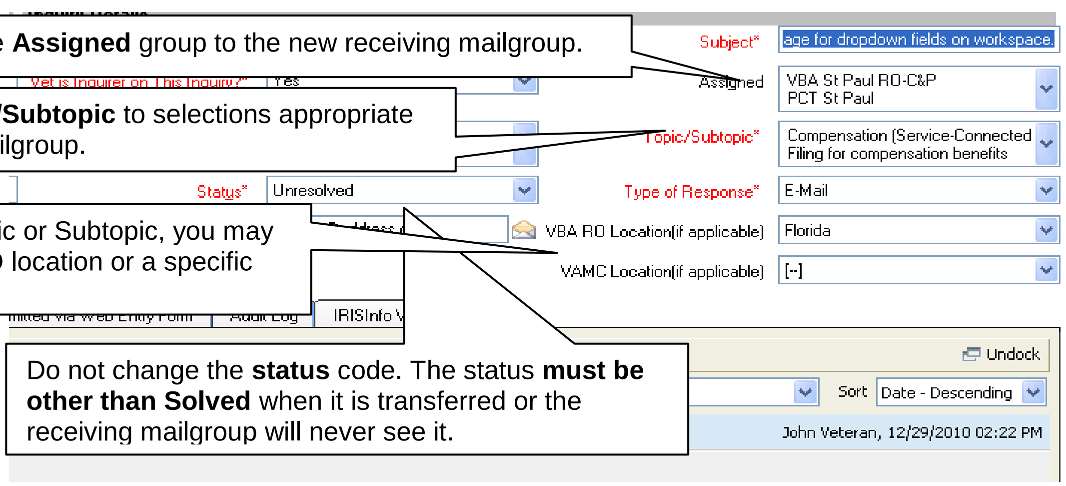


New inquiry number appears on copy of original.

Subject line has "**Copy of**" inserted at the beginning of the subject string

Do the following *<u>on the newly created duplicate</u>*:

1. Change the **Assigned** field to the mailgroup that will receive the copy.
2. If necessary ,change the **Topic/Subtopic** field to reflect the **Topic/Subtopic** that is appropriate for the receiving group.
3. Do **NOT** change the status field from **Unresolved**. **NEVER** reassign an inquiry to another group in **Solved** status or they will never see it. The status **must be other than Solved** when it is transferred.



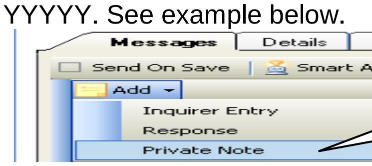
Change the **Assigned** group to the new receiving mailgroup.

Change the **Topic/Subtopic** to selections appropriate to the receiving mailgroup.

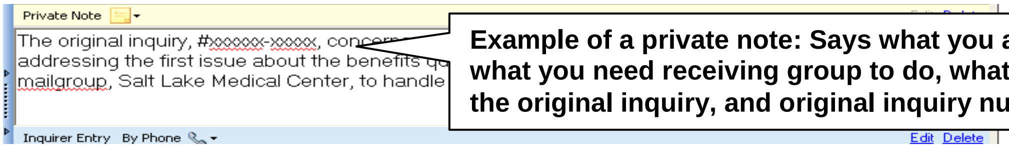
Depending on the Topic or Subtopic, you may need to select a VA RO location or a specific medical facility.

Do not change the **status** code. The status **must be other than Solved** when it is transferred or the receiving mailgroup will never see it.

Enter a **Private Note on the new copy** explaining that your group will handle issue(s) XXXXX and that you are creating a copy and sending the copy to them to handle issue(s) YYYYY. See example below.

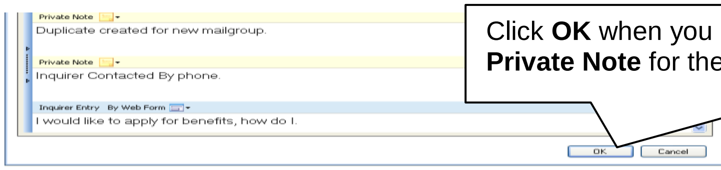


Enter a **Private Note** to explain to the new group what they need to do and what issue(s) your keeping with the original inquiry.



Example of a private note: Says what you are transferring, what you need receiving group to do, what you are keeping on the original inquiry, and original inquiry number.

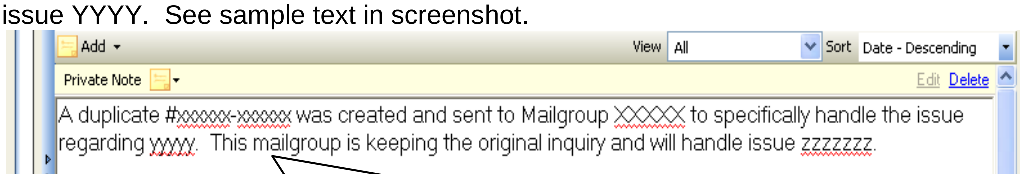
4. Click **OK** when you have changed the **Assigned** group, **Topic/Subtopic** and entered the **Private Note**. When you click **OK**, the duplicate will no longer appear on your screen, *but it won't be recorded and transferred until you* ***Save*** *or* ***Save and Close*** *the original inquiry.*



Click **OK** when you have changed the fields and added the **Private Note** for the new mailgroup.

Next, do the following <u>to the original inquiry that you are keeping:</u>

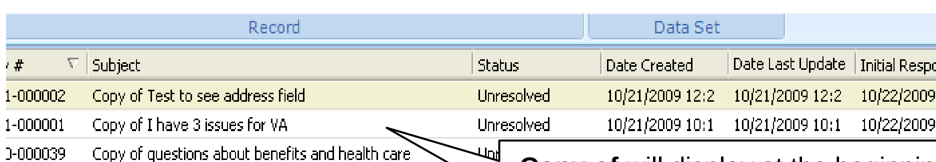
5. **Add a Private Note *to the <u>original</u> inquiry that you are keeping***. The **Private Note** should say that you have created a duplicate inquiry #xxxx and sent it to mail group xxxxx to handle issue YYYY. See sample text in screenshot.



Add a Private Note to the original inquiry

6. When you send a response to the inquirer, be sure to tell him/her that you have created a separate inquiry to address issue yyyy and that s/he will be hearing from another mailgroup on that issue.

7. Click on **Save** to keep the original inquiry open on your screen and send the duplicate to the receiving mailgroup **OR Click Save and Close** to close the inquiry on your screen and also send the duplicate to the new group. When the duplicate inquiry displays on the inquiry console of the receiving mailgroup, the subject line will say "**copy of**" at the beginning of the text in the Subject field.



Record					
#	Subject	Status	Date Created	Date Last Update	Initial Respo
1-000002	Copy of Test to see address field	Unresolved	10/21/2009 12:2	10/21/2009 12:2	10/22/2009
1-000001	Copy of I have 3 issues for VA	Unresolved	10/21/2009 10:1	10/21/2009 10:1	10/22/2009
0-000039	Copy of questions about benefits and health care	Un			

Copy of will display at the beginning of the subject line of the line item that is received by the other group.

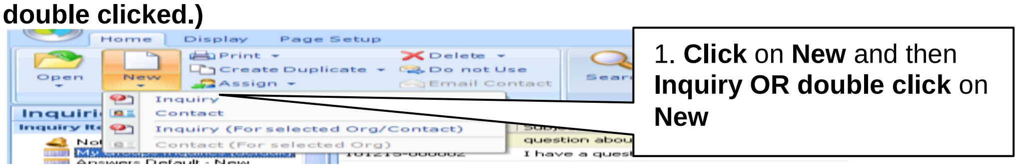
Customer Entry on Behalf of Veterans: Create a New Inquiry for an Inquirer or Update an Existing Inquiry

Inquiries are submitted 1) by veterans and other IRIS customers from the **Ask A Question** link on the IRIS home page on the VA Web site or 2) created by VA staff to record, track, and respond to contacts that are made via phone contact with call centers and/or walk-in traffic.

Create an New Inquiry

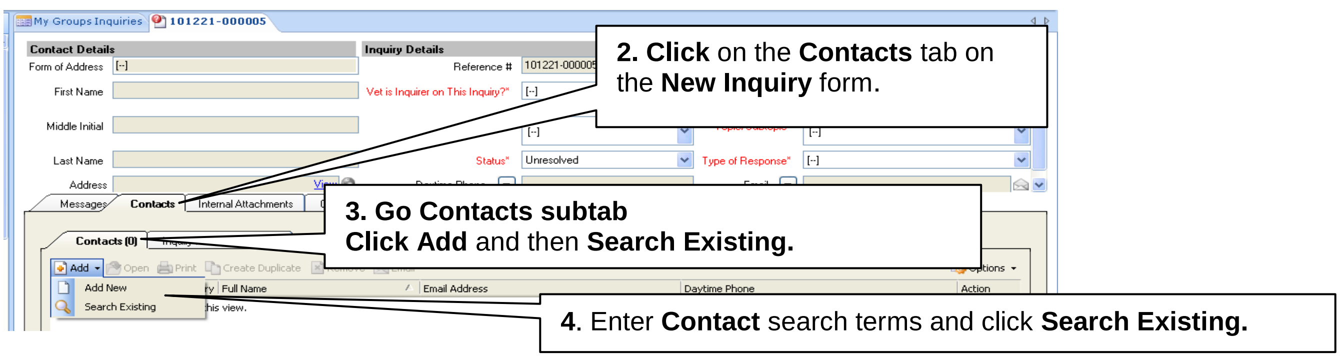
Note: To create or update a new inquiry, assume the role of person for whom you are creating the inquiry, i.e., if the veteran is the inquirer/caller, write as if you are the veteran when you complete the customer entry forms; if you are talking to someone other than the veteran, assume the role of the spouse, relative, friend, etc., when you enter the customer entry data.

1. Click on the New Button and select Inquiry or click New twice. (Inquiry is the default if double clicked.)

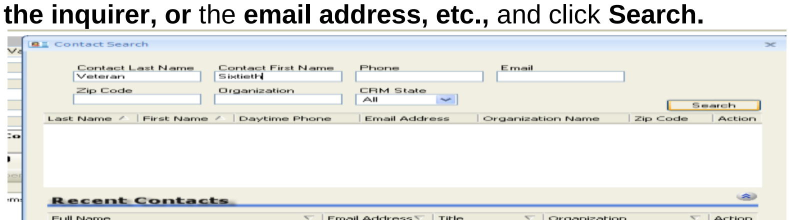


2. <u>Go directly to the Contacts tab</u>; do **NOT** complete any data fields. The system has already assigned a number and assigned the inquiry to your mailgroup.

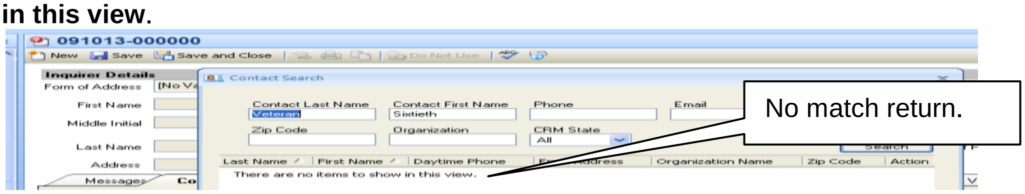
3. On the **Contact** subtab**, click Add** and then **Search Existing. YOU MUST DO A Search Existing** TO SEE IF THE CONTACT IS ALREADY IN THE IRIS AND/OR IF THERE ARE ANY OUTSTANDING INQUIRIES IN THE SYSTEM.



4. When the **Contact Search** box opens, enter the **Contact Last Name** and **Contact First Name of the inquirer, or** the **email address, etc.,** and click **Search.**



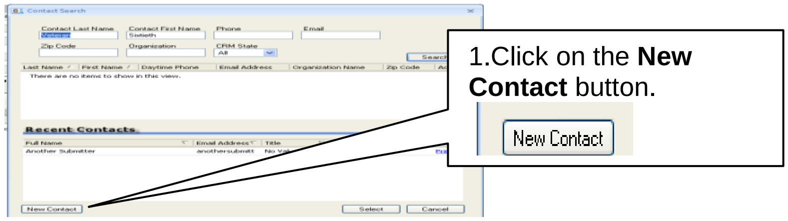
If there is **No Match** on the **Contact** search**,** the screen return will say "**There are no items to show in this view**.



If there is no contact match; contact is not in the system

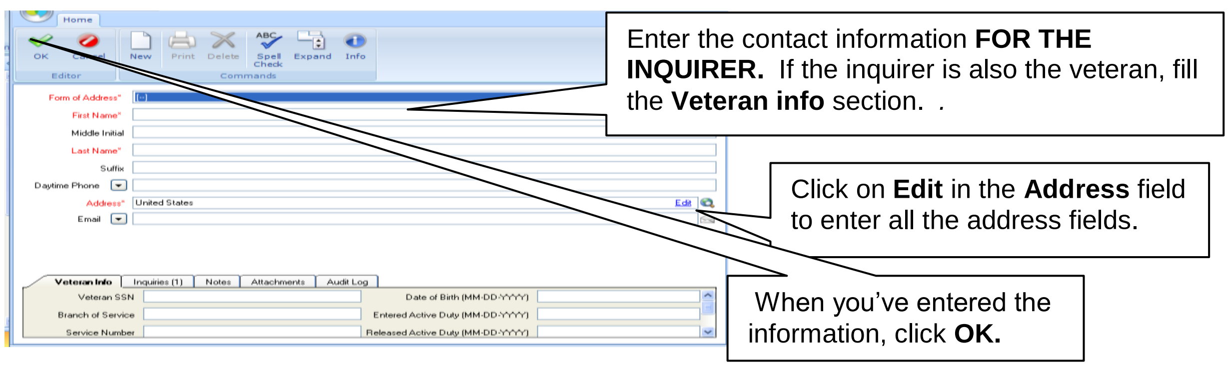
If there is no contact match, you will create not only a new inquiry, but also a new contact record for the person(s) involved in the inquiry.   (If there is a match, skip to the **If there is a match** section.) .Perform the following steps:

1. Click on the **New Contact** button on the bottom left of the **Contact Search** box.

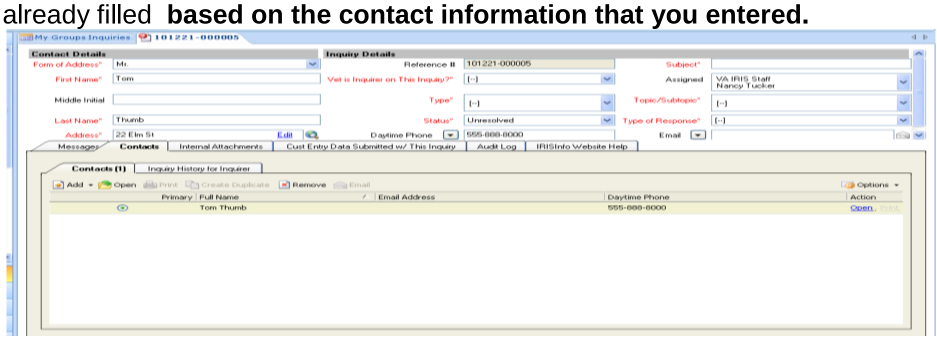


2. **Do NOT start filling in data fields. Go** to **Contacts tab> Contacts subtab**, Then **Click** on **Add** button and **click Add New.**

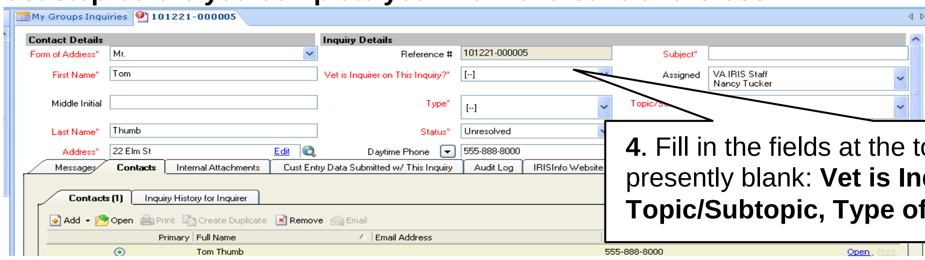
3. **Complete** the **New Contact** form with details about the **inquirer**. **If the inquirer is also the veteran, fill out the veteran information**. (If the inquirer is asking on behalf of the veteran, create the veteran's contact record later. See steps below for adding a second contact to the same inquiry). When you've entered the information into fields, click **OK.**



After you click **OK**, the screen will return to the inquiry input screen. Some of the fields are already filled **based on the contact information that you entered.**

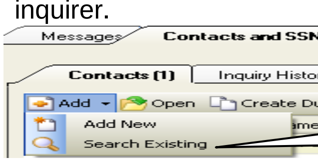


4. **Fill** in the empty fields at the top of the screen; those fields are: **Inquirer the Vet? Subject** line, **Type** of Inquiry, **Topic/Subtopic** (you must select both), **Type of Response** preferred, etc. **NOTE:** The **Assigned** mailgroup is shown as your own by default. You will need to select the correct mailgroup who will handle the inquiry from the **Address** dropdown **as the last step before you complete your work** and **Save and Close**.



4. Fill in the fields at the top of the inquiry that are presently blank: **Vet is Inquirer?, Type, Subject, Topic/Subtopic, Type of Response.**

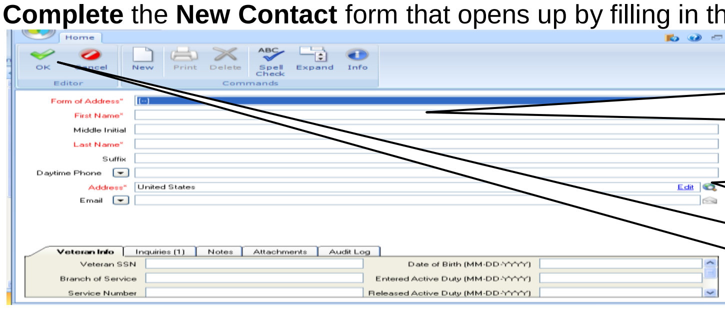
5. **If the inquirer is not the veteran but is asking about a veteran, click on Search Existing** again on the **Contacts** tab, and search the IRIS database to see if there is a contact record for the veteran. If not, create a **New Record** again. **Note that the tab says Contacts (1);** this means that you have created one (1) contact for this inquiry, who is the inquirer.



5. If the inquirer is asking for/about a veteran**, Click** on **Search Existing** on the **Contact** tab again. If there is no match, click on **New Record** and enter the veteran's data.

(You will have to repeat this process for all the contacts material to the inquiry. If the veteran is the inquirer, there will be one contact. If someone inquires on behalf of a veteran, there will be two. If someone is representing the dependent of the veteran, there will be three. BE SURE THAT THE RADIO BUTTON IS CLICKED FOR THE INQUIRER.)

6. **Complete** the **New Contact** form that opens up by filling in the veteran's information**.**



6. Enter the contact information **FOR THE VETERAN** if other than the inquirer.

Click on **Edit** in the **Address** field to enter all the address fields.

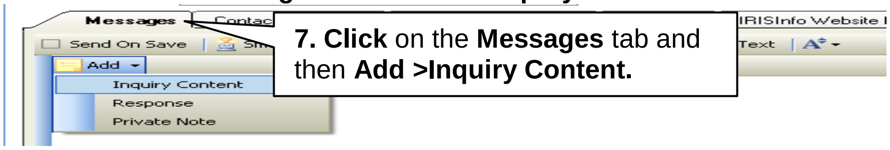
When you've entered the information into fields, **click OK.**

The screen will return to the inquiry screen. Two contacts will now be shown; the inquirer is the person whose line item is checked by the radio button. There are now two **(2)** contacts annotated on the **Contacts** subtab. Two line items are shown for the contacts. The one with the radio button checked is the inquirer and the other is the veteran cited by the inquirer**. Do NOT change the radio button settings.**

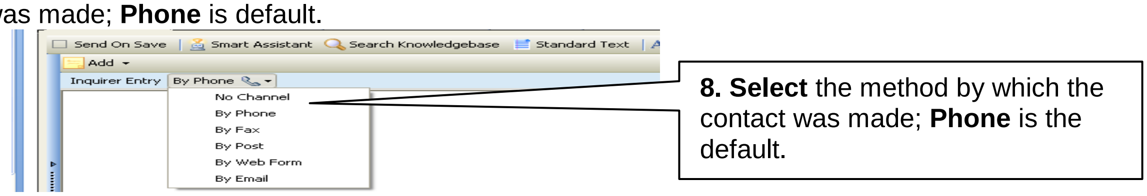
Two **(2)** contacts are now annotated on the **Contacts** subtab.

Two line items are shown for the contacts. **The one with the radio button checked on the far left of the item is the inquirer** and the other is the veteran cited by the inquirer.

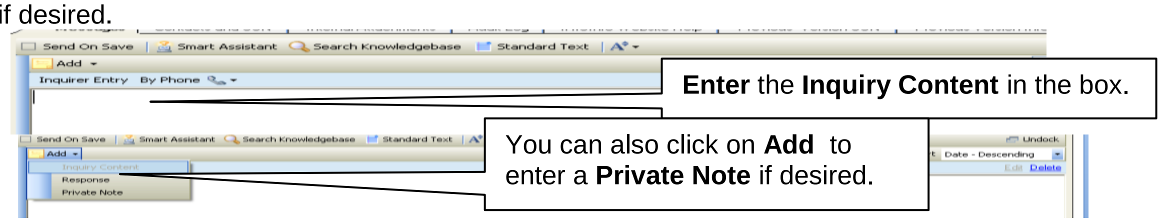
7. **Click** on the **Messages** tab and then **Inquiry Content.**

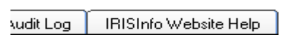


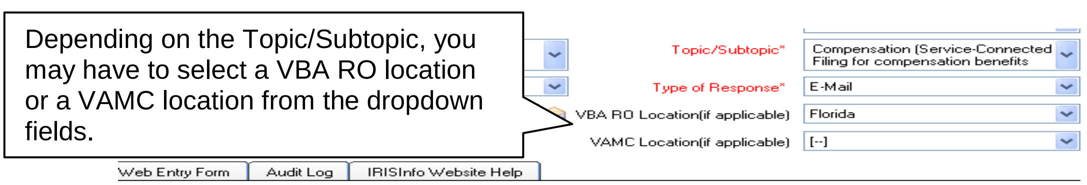
8. The **Inquirer Entry** mode is selected and is displayed**. Select** the method by which the contact was made; **Phone** is default.



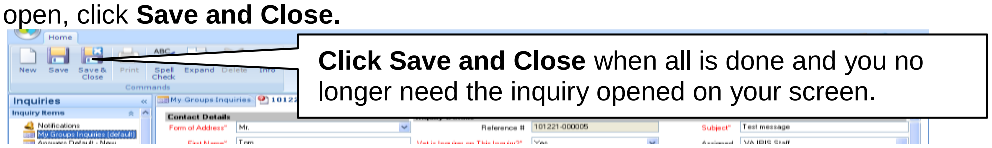
9. **Enter the content of the message** in the box**.** You can also click on and **Add** a **Private Note** if desired.



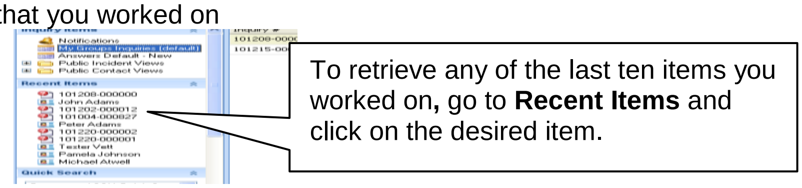
10. **Select** the correct **Assigned** mailgroup and a subset of the mailgroup. (Subsets must be selected for alerts to be sent that the receiving group/person has IRIS traffic.) If you are not sure who has jurisdiction, click on the **IRISInfo Website Help** tab  which goes to the IRISInfo Intranet website, and select the **IRIS Participants Dropdown List** document. This document lists all IRIS mailgroups in order of appearance and provides additional information about service areas, etc. Put your cursor in the text, do a Control+F and enter your search term. You will find all instances of that search term. **In addition,** if the Topic/Subtopic is a VBA business line, you MAY need to select the RO from the dropdown field. If the Topic/Subtopic is Medical Care at a Specific Facility, you will need to select the VAMC location.



11. If all your work is done, the correct **Assigned** mailgroup to receive the inquiry is selected, all the data fields completed, message entered, etc., and you no longer need to have this inquiry open, click **Save and Close.**

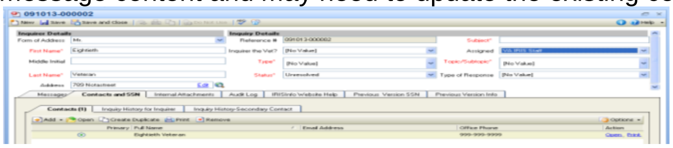


Note: If you need to retrieve this inquiry, you can click on its reference number on the side navigation pane to reopen it. **Recent Items** shows **the last ten** inquiries and/or contacts that you worked on

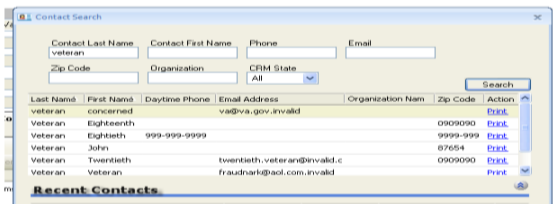


If there is a contact match; contact exists in the system

If there is one exact contact match, the inquiry form will immediately open up with some of the data fields already filled with the known contact information. You must complete the unfilled fields and the message content and may need to update the existing contact information.



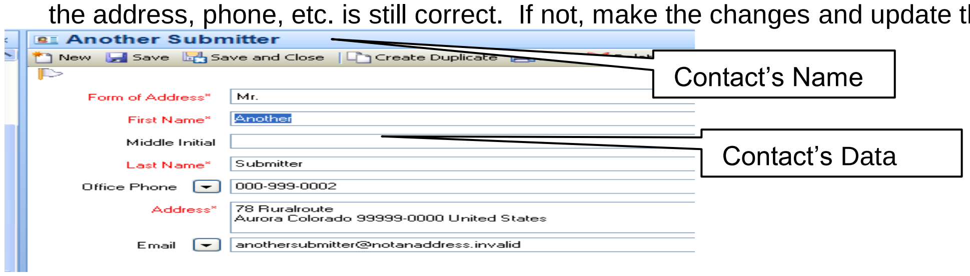
If there are multiple results for persons/contacts having the same name and/or email address, you will need to examine the line items that match to determine which existing contact is the right one and click on the name. In the following example, the **Last Name** only was searched. There are 8 returns for existing contacts with this **Last Name**. **You will need to determine which one is the correct one and select it by clicking on the correct name.**



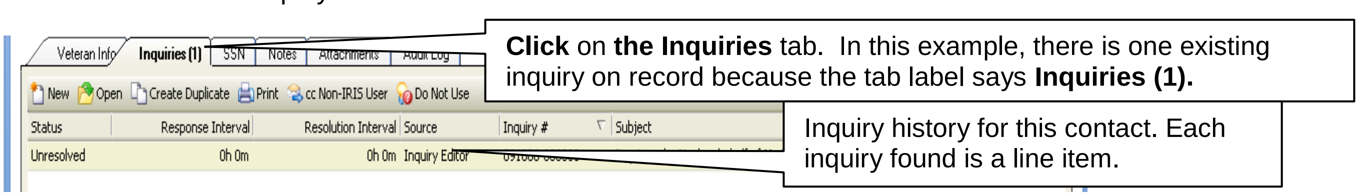
Once you have clicked on the correct contact, the inquiry form will immediately open up with most of the data fields already filled with the known contact information. You must complete the unfilled fields and the message content.

Perform the following steps:

1. Check the contact information that is filled in on the top of the contact screen to make sure the address, phone, etc. is still correct. If not, make the changes and update the record.

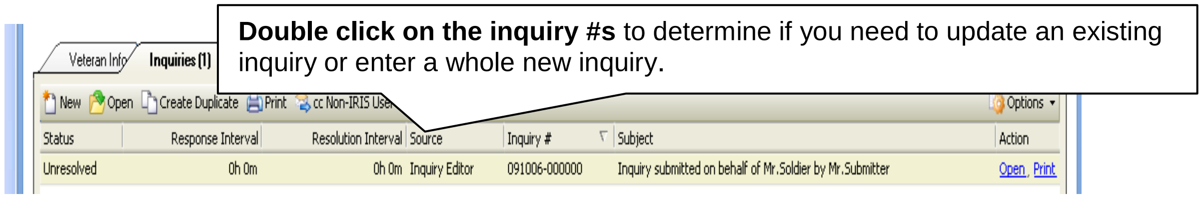


2. Click on the **Inquiries** tab. The tab itself will have a number in parentheses next to the tab label that is the number of inquiries that exist in the system for this contact/person. Opening the Inquiries tab will display any inquiries that have been submitted for or on behalf of this contact name that have not yet been purged from the system. Inquiries are purged from the system when they have in Solved status and inactive for 24 months. In the following example, there is one **Unresolved** inquiry.



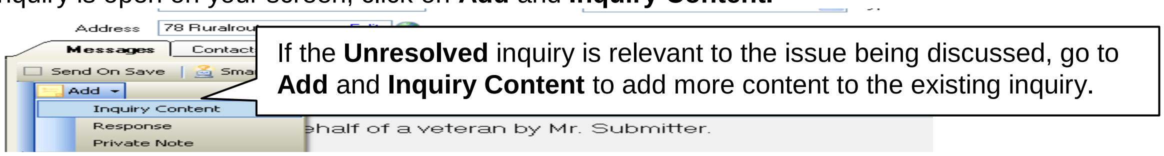
3. Check the inquiries to determine if you need to *update an existing inquiry* **or** *enter a whole new inquiry.* **Create a new inquiry** if the current issue is other than an issue in an existing inquiry. **Do not re-open an inquiry that has been in Solved status for more than 31 calendar days; create a new inquiry.**

- **Determine** if any inquiries listed are germane to the current issue being discussed. **Double click** on the inquiry numbers to open them up to check.

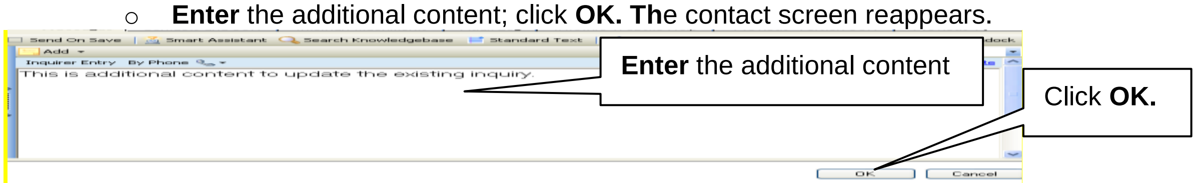


Update an existing inquiry:

If the inquiry opened on your screen *is germane* to the issue being discussed and *is sufficiently current* to warrant an update, Add to the existing **Inquiry Content.** When that inquiry is open on your screen, click on **Add** and **Inquiry Content.**



- ○ **Enter** the additional content; click **OK. Th**e contact screen reappears.



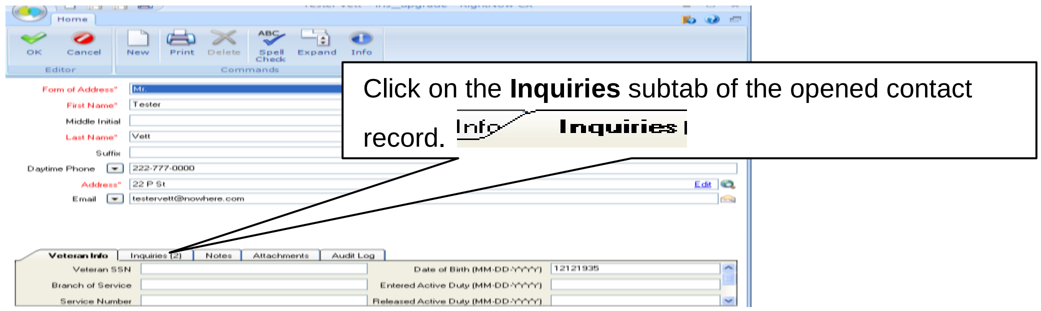
- ○ **If you have re-opened an inquiry in Solved status,** be sure to change the status code to **Unresolved.** An inquiry in **Solved** status will never be seen by the responsible mailgroup. **NOTE**: **If the inquiry has been in Solved status for more than 31 calendar days,** you **must** enter a **new** inquiry *if the issue is not material to an issue discussed in an existing inquiry. Do NOT re-open any inquiries that have been in Solved status for more than 31 calendar days **and** the Solved inquiry was successfully resolved.*
- ○ **Click Save and Close** on the screen that comes up to save your addition and close the inquiry on your screen.

NOTE: YOU WILL NEED TO CREATE A NEW CONTACT OR FIND THE EXISTING CONTACT RECORD FOR EACH PERSON INVOLVED WITH THE INQUIRY USING THIS METHODOLOGY.

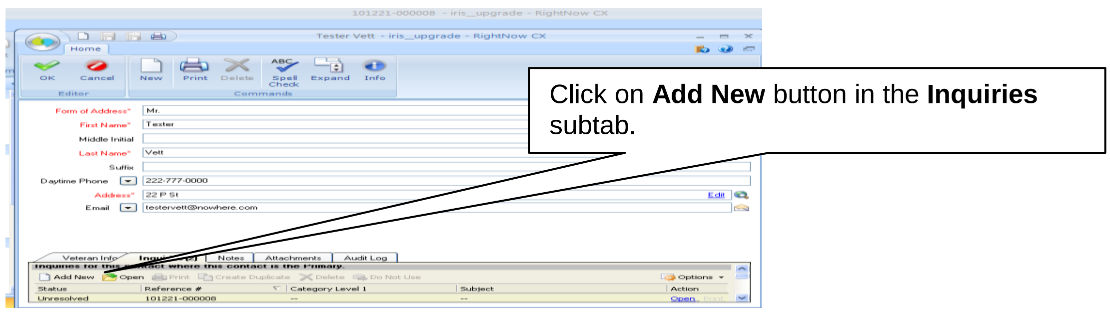
Create a New Inquiry for an Existing Contact

If you determine that updating an existing inquiry is not appropriate and that it makes more sense to initiate a new inquiry, then you must **Create a New Inquiry for the existing contact/person** by doing the following**:**

1. **Click** on the **Inquiries** subtab for this contact record. This action will autofill the contact information.

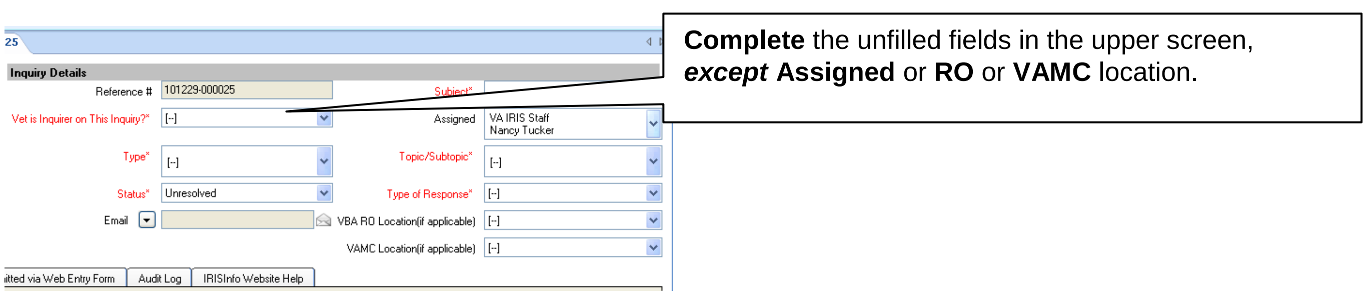


2. **Click** on the Add **New** button.

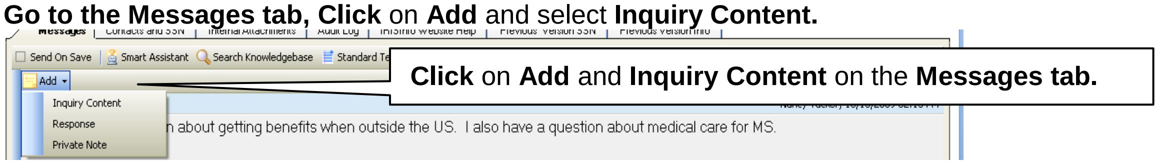


The inquiry form immediately opens up with some of the fields auto-filled from the **Contact** information. **You must complete the unfilled fields on the upper screen except the Assigned field (Save the Assigned field for last item before saving and closing).**

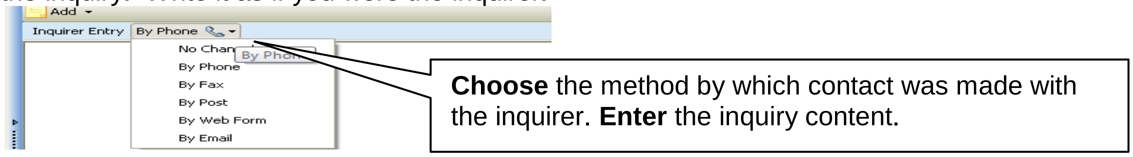
3. **Complete** these unfilled fields in the upper screen: **Inquirer the Vet?**, **Type** of inquiry, **Subject** line, , **Type of Response** preferred. The **Assigned** mailgroup is shown as your own by default. You will need to select the correct mailgroup who will handle the inquiry from the **Assigned** dropdown before you complete your work and **Save and Close.** Do not change the **Assigned** field or the location fields until you are ready to **Save and Close.** <u>**NOTE:**</u> If the Topic/Subtopic selection is a VBA business line OR is a health/medical issue pertaining to a specific facility, you will need to select an RO or VAMC location from the dropdown fields.



4. **Go to the Messages tab, Click** on **Add** and select **Inquiry Content.**

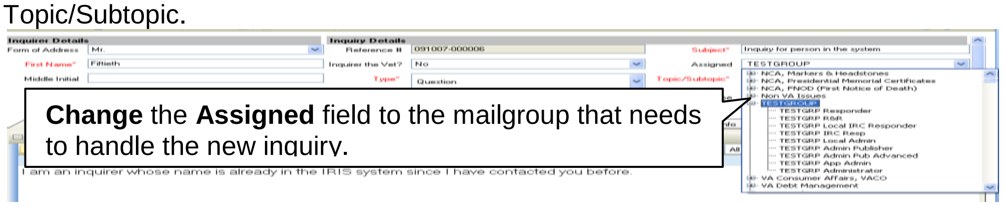


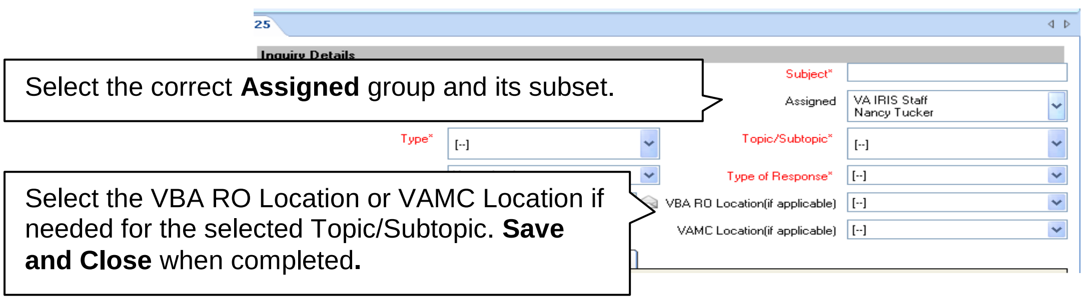
5. Choose the method by which contact was made with the inquirer and **enter** the content of the inquiry. Write it as if you were the inquirer.

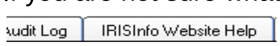


6. **Enter a Private Note** if you deem it necessary.

7. Change the **Assigned** field to the mailgroup that needs to handle the new inquiry; you may also need to select a VBA RO location or VAMC location, depending on the Topic/Subtopic.



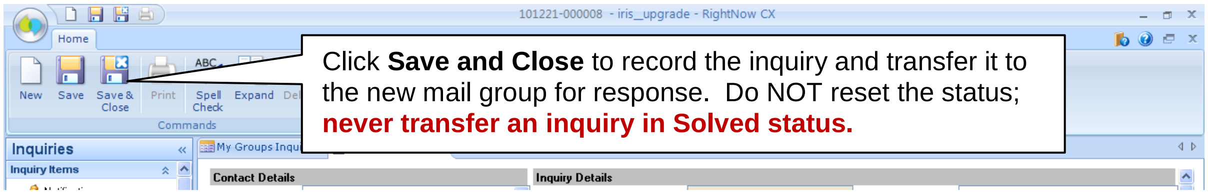


If you are not sure what mailgroup has jurisdiction, **click** on the **IRISInfo Website Help tab**  which goes to the I**RISInfo** Intranet website, and **select** the **IRIS Participants Dropdown List** document. This document lists all IRIS mailgroups in order of appearance and provides additional information about service areas, etc. Put your cursor in the text, of that document, **do** a **Control+F** and **enter** your search term. You will find all instances of that search term as you scroll through the document.

Mail groups are listed in alphabetical order. NCA appears at the top, VA organizations are next, all VBA organizations begin with VBA, all VHA location begin with VHA. If it is a VBA Comp and Pen destination, pick the subset that says PCT (Public Contact Team), otherwise pick any subset that shows "Responder Group"

If you are unsure of areas of jurisdiction, etc., see full listing of all mail groups in the IRIS, the order in which they appear, service area information, etc., on the **IRIS Participants Dropdown List** document at http://vaww.va.gov/irisinfo/irisguides.asp. Please create a direct link to this document or use the IRISInfo Website Help tab  that opens the IRISInfo website directly. When needed, open up the document, put your cursor in any of the text, do a control+F to open a search box and enter your search location. All occurrences of this term will be found so that you can find the correct one.

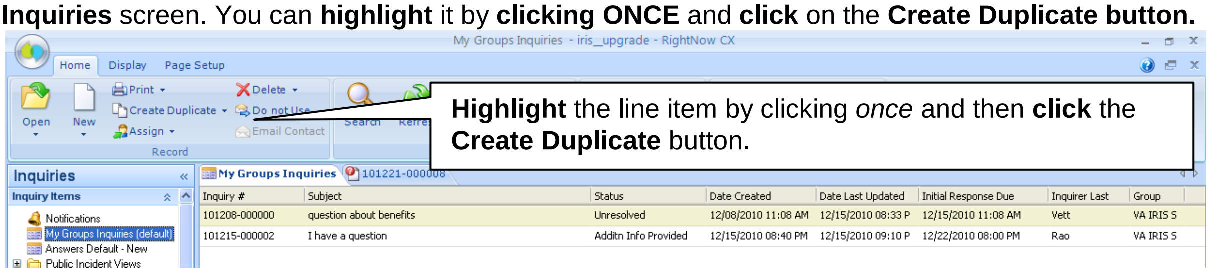
8. When you have completed the data fields and the inquiry content, selected the correct receiving mailgroup in the **Assigned** field, click **Save** (saves data but leaves inquiry open on your screen**)** or **Save and Close. Save and Close** will record the inquiry and transfer it to the new mail group for response. *Do NOT reset the status; **never transfer an inquiry in Solved status.***



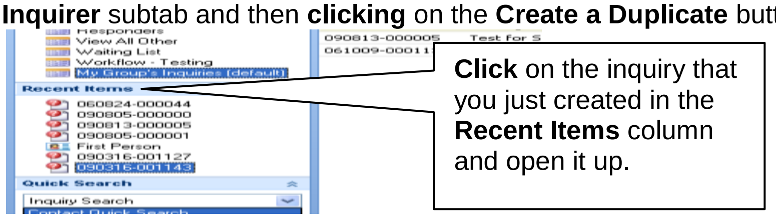
Create a Duplicate of an Inquiry that you just created

If the inquiry that you created addresses multiple issues that need to be handled by multiple mailgroups *and has been **Saved** to the system*, you can create duplicates and send them to the other respective mailgroups for handling. **To initiate this process**, do the following and then **follow the instructions in this manual re: Create a Duplicate.**

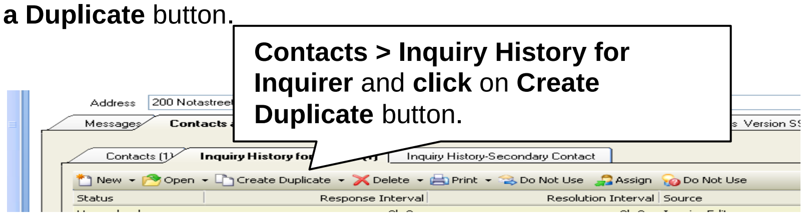
1) If the inquiry is saved and belongs to your mailgroup, it will be listed on you're **My Group's Inquiries** screen. You can **highlight** it by **clicking ONCE** and **click** on the **Create Duplicate button.**



2) You can **reopen** the inquiry that you just created and **Saved and Closed to another mailgroup** by **clicking** on the item in the **Recent Items** column on the left navigation pane. Once it is open on your screen, you can create a duplicate by **clicking** on **Contacts tab** and **Inquiry History for Inquirer** subtab and then **clicking** on the **Create a Duplicate** button. See screenshots below.



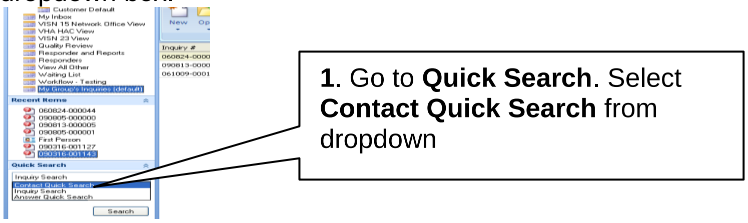
3) If you have created the inquiry and clicked **Save** but *not* **Save and Close** leaving the inquiry open on your screen, **click** on **Contacts tab** and **Inquiry History for Inquirer** and then click on the **Create a Duplicate** button.



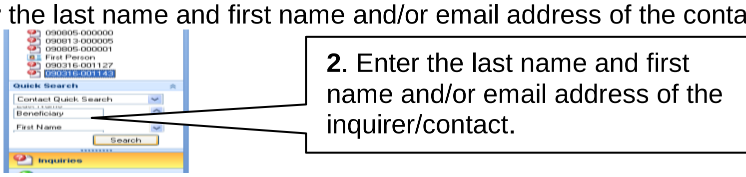
Go to Create a Duplicate section of this manual for further instructions.

Updating a Contact Record (Inquirer and/or Veteran data)

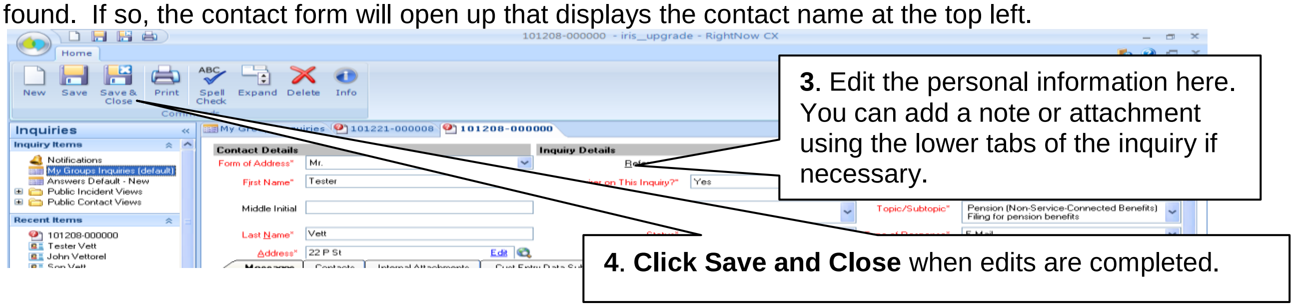
1. Do a **Quick Search** for the contact. Go to **Quick Search**. Select **Contact Quick Search** from the dropdown box.



2. Enter the last name and first name and/or email address of the contact (inquirer and/or veteran).



3. Edit any of the information that is found on the Contacts tab of an inquiry if a contact record is found. If so, the contact form will open up that displays the contact name at the top left.



4. **Click Save and Close** when edits are completed.

Summary of Steps to Create an Inquiry

1. Open the IRIS
2. Double-click New button**.**
3. Go directly to **Contacts tab** to determine if the **inquirer** exists in the IRIS system. If the inquirer is asking about a veteran, ***always handle the inquirer information first***.
4. Click on **Add** button in the **Contacts** tab and then **select Search Existing** to find the contact record, if any.
5.a If there is NO record, click on **New Contact button on the Contact Search box,** When the **New Contact** form opens up**, complete New Contact form** and **click OK. (If the contact is also the veteran,** enter that data on the **New Contact form** also**.)** The inquiry will open up and will display **some** of the data you entered on the inquiry fields on the upper screen.
b. If there is a record, the inquiry screen will immediately open up; the new inquiry upper screen will populate with existing contact information. You can edit the information if it needs to be updated.
c. If inquirer is asking about a veteran, do another search in the **Contacts tab** to see if the veteran has a record in the system**. If there is no match, click on Add>New** in the **Contacts tab** and enter the data on this individual in the contact form that opens up. This persons' contact information will be added to the inquiry. **If there is a match**, the existing contact information will be added to the inquiry. You can edit this information by selecting the person's name listed on the **Contacts** tab.

6. Enter the message on the **Messages tab, by clicking** on **Add>Inquirer Entry.**
7. Complete the unfilled fields on **the upper inquiry screen: Subject, Type, Type of Response.**
8. If the receiving mailgroup who will handle the inquiry needs additional information or attached documents**, add a Private Note** using the **Add>Private Note** selection and add the document(s) using the **Internal Documents tab.**
9. Determine the correct routing destination and **select** from the **Assigned** field dropdown listings**. Select** the correct mailgroup and its subset. Also be sure that the **Topic/Subtopic** selection is appropriate for this inquiry. Depending on the **Topic/Subtopic,** you MAY need to select from the **Locations** fields**.** Most **any** VBA disciplines will need the **VBA RO Location** field selection**;** any **Health/Medical for a Specific VAMC** will need the **VAMC Location** selection.
10. Take an inventory to ensure that all the fields are filled, attachments added, etc**.** If all your work is done, **click Save and Close.** This will complete all activities, send the inquiry to the correct location, and close out the inquiry on your screen.

Posting/Updating Standard Text or Answers/FAQs:

Standard Text: Anyone who wants a **Standard Text** response posted to the IRIS for use by IRIS responders should create the response, ensure its integrity (accuracy, spelling, clarity, etc.), forward to the appropriate manager(s) for review and approval, and then have that manager send it to the VA IRIS System Admin Group via regular e-mail for posting to the IRIS.
Answers/FAQs: FAQs in the IRIS Knowledge Base should not repeat the specific information found on VA's numerous websites. Those websites are the authoritative sources for specific information. FAQs must be generic in nature and point to those Websites as often as possible to prevent a disparity of information and to minimize the overhead to maintaining accurate information in more than one place. When a generic statement with a link isn't possible or is not the best way to proceed, more detailed FAQs may be crafted and posted. New FAQs and corrections to existing FAQs must be factually correct and vetted by appropriate management and then sent via regular email to the VA IRIS System Admin Group for posting. Those Standard Text responses and FAQs must not duplicate Standard Text or FAQ that already exist.

IRIS Troubleshooting Questions

1. **How do I log into the IRIS after I have set a bookmark?**
   Click on your Start button on the bottom tray of your screen, go to All Programs, select RightNow Technologies and click on it. Each designated IRIS mail group member is provided with a username and a password that are case sensitive. Enter these codes in the appropriate boxes on the log in screen.

2. **When I click on the link in the alert message, I immediately get Access Denied. What is the problem?**
   This problem is usually caused by entering access codes without regard to the correct case sensitivity. If you have entered your codes incorrectly three times, you will be locked out and will need to request an unlock via Outlook mail to the VA IRIS System Admin Group.

3. **I can't find my solved inquiries. Where are they?**
   Inquiries with different status codes are viewable on different consoles. The My Group's Inquiries home screen displays inquiries whose status codes are other than Solved or Solved-Duplicate. You must navigate to your Solved basket. To do this, click on the big **Search** button. When the search box opens, click on the Status codes for Solved and Solved-Duplicates only. Then click Search. The new display will be the inquiries in Solved status for the past six months. To return to the open inquiry screen, repeat the same steps using all status codes except Solved and Solved-Duplicate and then search again.

4. **I did everything right, but the IRIS wouldn't send my response. What's wrong?**
   When you have typed in a response and clicked on **Save** or **Save and Close** and then received a message that the IRIS couldn't send the message, it means that the veteran did not provide an e-mail address to which the response can be sent. Usually this also means the veteran requested an answer by phone or by surface mail as well. Check the **Type of Response** field to see how the veteran wants to receive his/her reply. If other then email, you must delete all of your response in the response box (click on one character in your response and then click control + A to highlight all of the contents of the response box. Then click on delete. If any characters, including space characters, remain in the response box, the IRIS will think that you still intend to send a response via the veteran's e-mail address. Response by surface mail or phone, then add an **Private Note** in the IRIS saying what you did to resolve the issue. Then manually set the status of the inquiry to Solved and click Save. The IRIS will record your internal note, change the status and move the inquiry to the Solved Console.

5. **I had to answer the veteran by phone or by mail because there was no e-mail address to send an electronic response (see 3a above).. I removed the response I typed into the IRIS, but it still doesn't work. What's wrong?**
   When you deleted the response that you typed into the response box, all of the characters did not get removed. If no letters are showing, it would indicate that a blank space character was not deleted. Be sure to click on the first space of the response box and hit the delete key until you are certain that all the characters have been removed

6. **An inquiry was simultaneously routed to multiple addresses; how did this happen?**
   It is not possible to MANUALLY route an inquiry to multiple locations. This circumstance occurs when a responder has an open inquiry on his/her screen and then the power to their computer is lost because the machine is turned off or a power bump occurs. When the power interruption happens, the problem that results is that the inquiry gets forwarded to a host of multiple locations. The software vendor informs us that there isn't anything that we can do except to ensure that everyone has a UPS backup on their systems.

7. **Why don't I get alerts that I have IRIS traffic?**
   IRIS traffic is routed via addresses in the Exchange mail system. Each IRIS destination must have a specifically named Exchange e-mail address. Those addresses are set up by local Exchange administrators and have distribution lists attached to them. Persons at a given location who need to receive alerts that IRIS traffic has arrived at their mail destination should have their names individually recorded on that Exchange mailbox distribution list to get alerts. If your name isn't on it, you will not get alerts. You must also set your Personal Settings to receive email alerts and the IRIS System Admins must set up your account to send the alerts to you. If an inquiry is reassigned to your mailgroup and a subset of your mailgroup is not selected when the new routing destination is selected, you will not get alerts.

8. **My mailgroup is in the IRIS all day and we don't want alerts. Can the alerts be shut off?**
   Yes, let the VA IRIS System Admin Group know that you don't want alerts for your group.

9. **Why can't the veteran open his response to read it?**
   Veterans receive e-mail message traffic telling them that VA has responded and telling them to click on the link in the message to get to the response. When they are unable to open up the response, it is because of the foibles of their browsers in combination with their screen settings. Part of the message with the link also tells them to cut and paste the link into the address field of their browsers if clicking on it doesn't work. This will usually remedy the problem unless they fail to capture the entire link. If their screen settings caused the link to wrap to an extra line, they may not capture all of it.

10. **Why do I get duplicate inquiries?**
    Duplicate inquiries are created by veterans and other IRIS customers when they fill out the customer entry form and then hit the Submit button more than one time. Every time they hit the Submit button, a duplicate inquiry is produced and recorded in the system. We have multiple warnings in red type by the Submit button asking them PLEASE not to click it more than once, but it still happens. When you get duplicates, answer one of them as you normally would, and on the duplicates, enter internal notes saying that the inquiry is a duplicate, the original was answered on (date), manually set it to Solved and Save it.

11. **I'm looking for an inquiry that was Resolved over a year ago and I can't find it. Where is it?**
    Once an inquiry is in resolved status for 19 months and has had no internal or external activity, it is purged from the system. Any information provided by an IRIS inquiry that is relevant to a claim or other transaction that exists in an official hard copy file should be printed out and added to that hardcopy file.

12. **Why do we only have five business days to respond to an inquiry?**
    VBA, VHA and NCA made a management decision that five business days is an appropriate time frame for response.

13. **Do all inquiries in a status other than Solved or Solved-Duplicate count as open and not completed?**
    Yes. Any inquiry in a status other than Solved, Solved-Duplicate, or Solved—too little info is considered open for statistical purposes.

14. **What is the life cycle of an inquiry?**
    The life cycle of an inquiry depends on how long it remains Unresolved. It is considered alive and active until its status is set to Solved. The life cycle of an inquiry can be reactivated if the veteran updates his inquiry at any time within 31 days of the last action taken on that inquiry, either internally or externally. For example, the veteran sends an inquiry. It is answered. The veteran updates that same inquiry within 31 days of his response, which re-opens it and extends it life cycle. VA answers the updated inquiry. The veteran comes back and updates the second response within 31 days, which reopens it. This type of activity can greatly prolong the life of the

inquiry.   Once 31 days have elapsed since the last action, the veteran must submit a new inquiry. NOTE: Veterans can also cancel their inquiries by clicking on a button that says “I no longer need a response to my inquiry. When this happens, the inquiry will be set to Solved and moved to your solved basket

15. How do I handle nuisance traffic?

IRIS mail groups have occasion to receive repeated inquiries from the same individual even though all necessary actions have been taken and there is nothing else that can be done. We cannot prevent anyone from using the Internet; nor can we prevent anyone from submitting or updating IRIS inquiries.   **The policy for handling this dilemma requires the consent of local management.** If local management agrees, you can enter a **Private Note** that says that everything that can be done has been done and no further responses will be forthcoming per instructions from local management. (Note: If a FOIA or other request is received that results in VA printing out IRIS inquiries involving a specific inquirer, the internal note may be seen. *Choose your words carefully when entering **Private Notes***. Then you manually set the inquiry to **Solved** and **Save and Close** it. Over time, the repeated inquiries are likely to stop.

16. How do we handle FOIA Requests?

The Freedom of Information Act (FOIA) requires that the agency must initiate action/route all requests for agency records within 10 days of having received it and that the agency will now be responsible for attorneys’ fees if the requester successfully sues the agency. The agency can be sued for failing to respond to a FOIA request within the statutory time frame (usually 20 days).

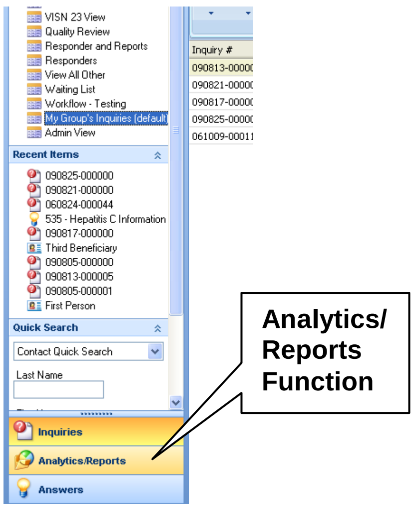
If something regarding FOIA comes through the IRIS, please be advised of the following:
The request for records does not have to say “FOIA request”. ANY request for AGENCY records is a FOIA request. (NOTE: this is not the same as an individual asking about his/her own records.) If you get an IRIS that contains ONLY a request for agency records, please notify your Privacy Officer immediately and let the inquirer know that all FOIA requests must be mailed or faxed with an original signature.

Analytics/Reports Basics

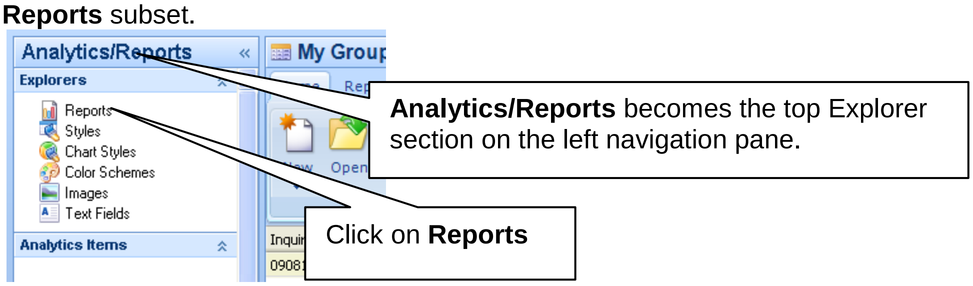
The following discusses how to get to the Reports function and demonstrates how to set parameters and schedule reports. **A complete discussion of the Analytics/Reports function is contained in the vendor manual that is available at http://vaww.va.gov/irisinfo/irisguides.asp .**

Navigating to Analytics/Reports

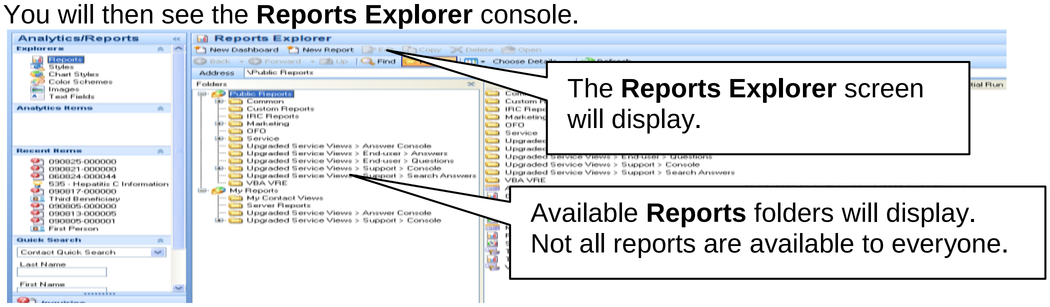
To access the **Analytics/Reports** function, click on the **Analytics** button near the bottom of left-hand pane (only available to IRIS users with **Analytics/Reports** access).



When you click on the **Analytics/Reports** button at the bottom of the pane, your choices **AT THE TOP** OF THE PANE change. You will see the header, **Analytics/Reports** and can **choose the Reports** subset.

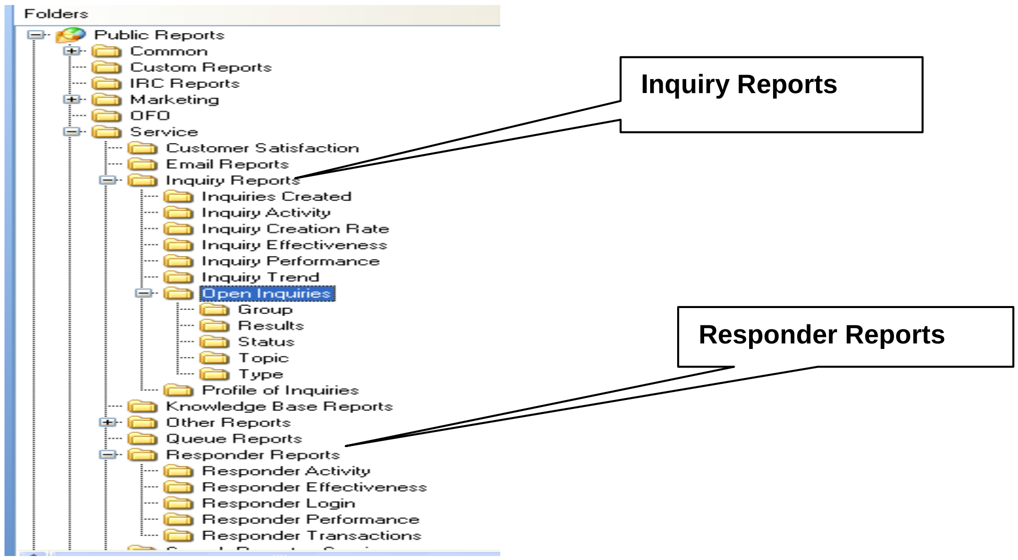


You will then see the **Reports Explorer** console.

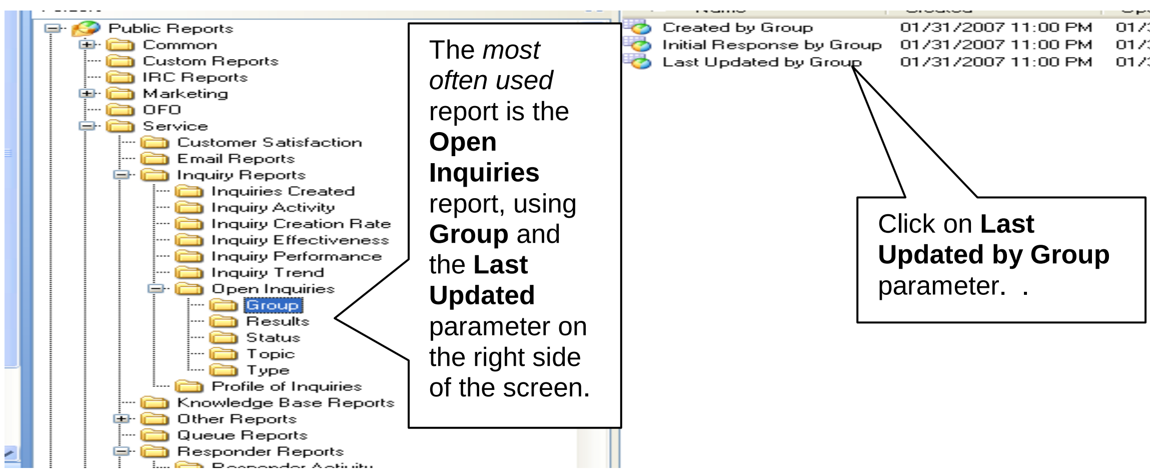


The most commonly used reports are in the **Service** report folder**;** you can expand this folder to see all the available reports subsets and click on the plus signs to see their subsets. The list of service reports reflects the most commonly used standard reports, such as **Inquiry Reports** and **Responder Reports.**

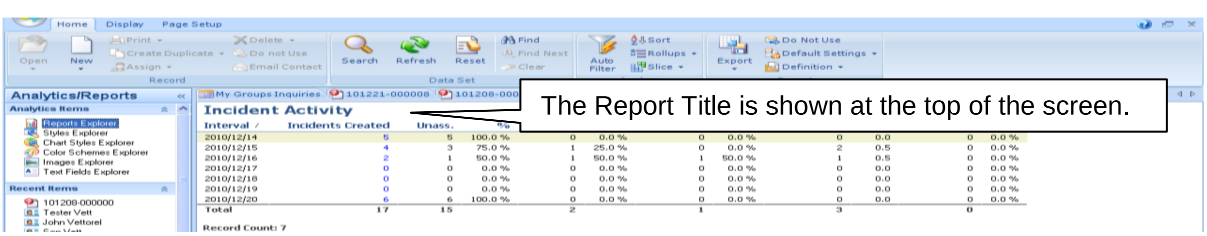
Service Reports



The *most often used* report is **Open Inquiries>Group> Last Updated**. The last update parameter calculates on the most recent activity, which is not necessarily the date of creation. Be sure to select the parameter that reflects the specific types of data that you are looking for. **This report is used for the following example**. See following screens.

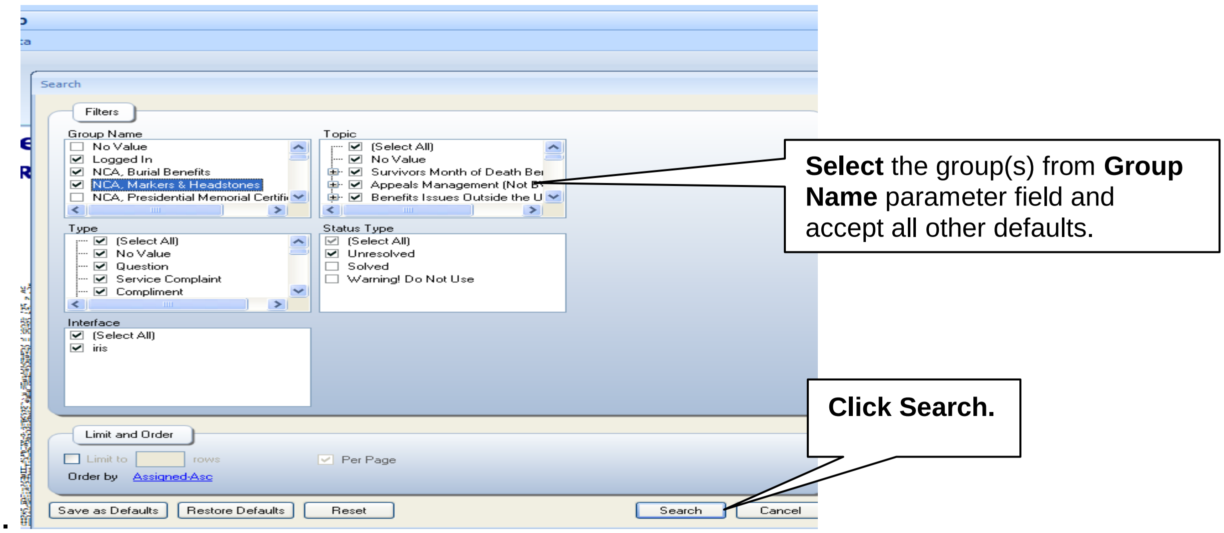


The **systemwide** data for all groups will then display on the screen.

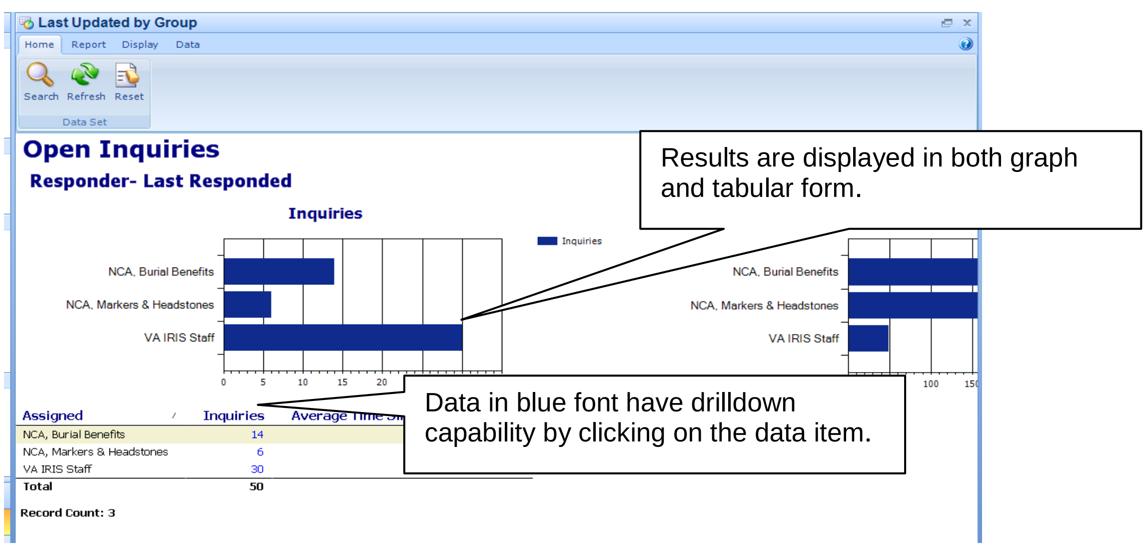


If you are granulating the report and setting parameters, in the **Search** box**, do the following:**

1. **Select** the **Group(s)** you are interested in (**Logged In** is your mailgroup); **click** on **Select All** to de-select all the mailgroups; hold down the control key to select specific groups.
2. **Accept the defaults** for **Type, Topic** and **Status, etc.**
3. **Click on Search**

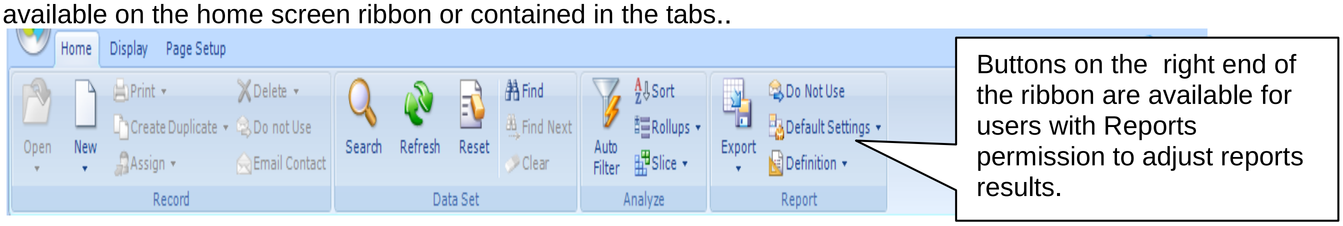


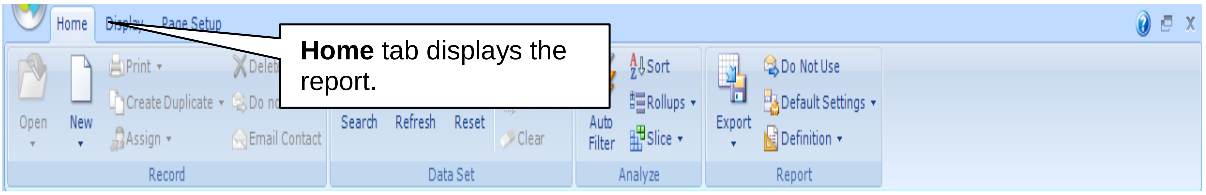
The results display in both graph and in tabular form and will reflect the information at the moment you pulled the report. Data in blue font have drilldown capability.
You can click on the data to see further granulation.

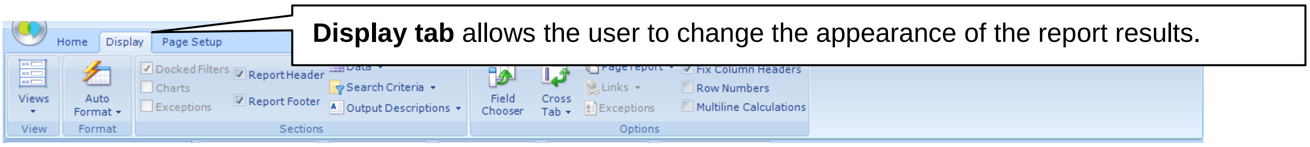


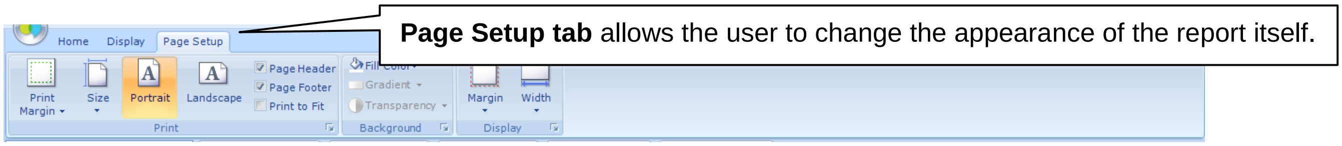
Reports Displays:

Once you have displayed the report on your screen, you can adjust how it appears by using tools available on the home screen ribbon or contained in the tabs..









For exact instructions on reports, please see vendor documentation about analytics/reports posted at http://vaww.va.gov/irisinfo/irisguides.asp .

Creating a New Report –NOT RECOMMENDED.

The existing standard reports should be sufficient for most needs. You may use ANY report that is visible to you on your Reports Console, so be sure that what you are looking for doesn't already exist. Creating a new report puts the burden on you to totally construct the report, the visual layout, column sizes, fonts, all of the variables, etc. See the complete Analytics manual from the vendor which is posted at **http://vaww.va.gov/irisinfo/irisguides.asp** **.**

Service Glossary

Access level—A method of controlling which public answers are visible on the IRIS administration and end-user interfaces. The default access levels is Everyone, which means that the FAQs/answers are displayed to the public and to VA employees.
Administration interface—All of the consoles, panels, and windows used by administrators and staff members to configure, manage, access, and work with an IRIS application.
Administrator—A staff member who configures, customizes, and maintains an IRIS application.
Analytics/Reports Console—The console where staff members can access standard reports and create custom reports. Reports can be customized using filters, comparison periods, trending analysis, graphical display, and output. Staff members can also subscribe certain staff members, groups, and email addresses to particular reports through the Analytics/Reports Console.
Announcements box—A white board or memo box that can be displayed on the IRIS Home page to make special announcements to veterans. This tool is used only on rare occasions by the IRIS System Administrators, usually to announce that the IRIS will be temporarily out-of-service due to emergency maintenance.
Answer/FAQ Knowledge Base—A list of all Frequently Asked Questions that have been entered into the IRIS by subject matter experts or their designees. The FAQs are indexed with VA's corporate search engine.
Answer/FAQ—Any knowledge base information in FAQs that provide answers to common questions from veterans and other IRIS customers.
Answer/FAQ/ Console—The console in the IRIS for adding, managing, and organizing answers that can be made available to veterans and other IRIS customers.
Answer/FAQ status type—The status of an answer that determines whether it can be viewed by veterans and other IRIS customers. The default answer status types are Public and Private.
Ask a Question—A link on the IRIS Home page that veterans and other IRIS customers can click to submit a question when they cannot find an answer in the FAQ knowledge base.
Audit log—A list of all the actions taken on a record in the FAQ/knowledge base, including who performed the action, what the action was, and when the action was taken.
Business rules—A component in the IRIS for defining processes that automate workflow, notification, and escalation. Business rules can be defined to automatically route incoming inquiries to the appropriate responders; escalate inquiries, update inquiries and update FAQs/
Category—Changed to Type for VA's usage. This term applies to the type of inquiry, which can be compliment, complaint, suggestion, question, etc.
Console—A major display window such as the Inquiry Console and the FAQ/Answer Console.
Dashboard—An option in the IRIS for viewing the Operations Dashboard report in the IRIS. This report shows new inquiry activity, solved inquiry activity, backlogged inquiries, open inquiries, and viewed end-user pages.
Database—The tables and data structure in an IRIS application that maintain, store, and retrieve information.
Discussion thread—The list of all activity on an inquiry, including updates made by the end-user, responses entered and/or sent by responders, and notes about the inquiry made by responders (never visible to veterans and other IRIS customers). All activity is listed chronologically and provides a history of each inquiry in the knowledge base.
Display position—The position where a new FAQ/answer appears on the Find Answers page. Options include Historical Usefulness; Place at Top, Middle, or Bottom; Fix at Top, Middle, or Bottom. The display position is selected from the Display Position drop-down menu on the Answer Console.
Disposition—*See* Inquiry disposition.
Distribution list—A mailing list of non-staff member email addresses used for scheduling reports or any mailing event.
Drag-and-drop—A feature for moving an element or object in a hierarchy.
Drill down—To start at a top or general level and become more specific at each lower level. The IRIS drill-down feature enables access to additional levels of detail on consoles, views, and reports.
Drill-down link—A link on a view grid for drilling down to the next level.
Email message—An email message that is automatically sent by the IRIS to veterans and other IRIS customers. The sending of email messages is triggered by events in the IRIS; for example, when a

veteran submits a question in the IRIS, the Question Receipt message will be sent to the veteran's email address telling him or her that VA has received their inquiry and will respond within 5 business days.

End-user—A veteran or other IRIS customer who accesses the IRIS end-user interface to look up and view answers or ask a question.

End-user interface—All of the pages in the IRIS that veterans and other IRIS customers can access to look up answers and ask a question.

Entry Setup window—The first window that opens after entering the IRIS administration interface URL in a Web browser. From this window, staff members can add a bookmark to their Web browser for the IRIS administration interface and also launch their IRIS application.

Everyone access level—An access level designed to allow answers to be visible to all staff members and veterans and other IRIS customers depending on the answer status.

File attachment—A VA file that is attached to an inquiry, answer, organization, or opportunity, or sent with an inquiry response. Files that are attached to an inquiry response can be accessed by viewing the answer. Sending a file with an inquiry response is a one-time function that attaches a file to the response. Veterans and other IRIS customers can access the file directly from their email client.

File Manager—The interface used to access modifiable files for IRIS modules.

Find Answers—A link on the IRIS Home page that opens the Find Answers page where veterans and other customers can view FAQs/Answers and search the knowledge base. Veterans and other customers can click an answer to view the complete details or search the knowledge base using drop-down menus to narrow their search. If enabled, veterans and other IRIS customers can also use the Browse search method to search the knowledge base by topics or Web Indexer to search Web sites or as an alternative search for answers. *See also* Browse *and* Web indexer.

Group—A mailgroup set up in the IRIS to receive inquiries from veterans..

Inbox—A responder mailgroup's list of inquiries. The inbox contains all inquiries that have been assigned to the responder mailgroup.

Inbox limit—The maximum number of inquiries in a responder's inbox that cannot be exceeded.

Inquiry—Any question or request for help from a veteran or other IRIS customer using the Ask a Question feature of the IRIS.

Inquiry archiving—A process that permanently removes inquiries from the database. Archived inquiries are then stored in searchable data files that can be viewed from the Contact tab. if the veteran has sent more than one inquiry from a single e-mail address in the past year.

Inquiry Console—The console in the IRIS for adding, editing, viewing, and responding to inquiries, and adding and maintaining contact and organization records. The Inquiry Console tracks all inquiries generated by veterans and other IRIS customers through any source. Also called *responder interface*.

Inquiry disposition—A feature for classifying inquiry resolution. Any number of dispositions can be defined to precisely record how inquiries are resolved. Also called *disposition*.

Inquiry Home—Also known as the IRIS home page. that contains links leading to the main functions. This page provides veterans and other IRIS customers with quick access to the tools they need to answer their questions and receive immediate customer service.

Inquiry status and status types—The current state of an inquiry. The inquiry statuses in the IRIS are Unresolved, Solved, Updated, Waiting for Contact, Additional Information Provided (occurs automatically when a veteran updates an existing inquiry), and Additional Information Requested and others added for VBA purposes.

Interface—The consoles, panels, windows, and pages used by staff members, veterans and other IRIS customers to access an IRIS application and interact with a single knowledge base. The interface name determines the URL for the Web site, the name of the IRIS executable, and the *.cfg* directory name.

IRIS—VA's Inquiry Routing & Information System, the mechanism by which veterans and other VA Web customers can find answers to Frequently Asked Questions and submit and route inquiries to VA. The IRIS assists customer service and inquiry organizations that need to easily capture, respond to, manage, and track all service interactions in one consolidated application.

IRIS Component Manager—An IRIS application that verifies that the inquiry files (or components) required to run the administration interface are installed and up-to-date. The Component Manager automatically runs prior to logging in to the administration interface.

IRIS components—Inquiry files, such as the IRIS executable, that are installed on staff members' workstations. IRIS components are partially responsible for the functionality of features such as the Analytics/Reports Console, expression validator, spell checker, and color layout. *See also* IRIS Component Manager.
keywordindexer—A utility that creates an index of the keywords found in inquiries, answers, file attachments, and documents indexed by the Web Indexer. The keyword indexes are used when searching inquiries, answers, file attachments, and other indexed documents. *See also* Web indexer.
Login—The action required to get into the IRIS using a username and a password.
Login window—The window that staff members open after entering the IRIS at https://iris.va.gov/scripts/iris.exe/login. From this window, staff members must type their login name and password to access their IRIS inquiries.
Mailbox—An Exchange mailbox specified in the IRIS as a routing destination that collects IRIS inquiries sent by veterans and other customers.
Multi-select—A feature on a number of consoles for updating more than one record at a time.
Navigation area—The right side of the top row of the toolbar containing buttons for accessing other IRIS modules that are enabled, common consoles, Help, and the Links menu.
Page—A Web page; an end-user page in the IRIS application.
Permissions—A component of views that determines which security profiles have the ability to run or edit a view.
Private—One of two default answer status types. FAQs/Answers marked Private are never visible to veterans or other IRIS customers..
Profile—A mechanism for controlling access to administration functions and for assigning staff members specific permissions, views, and report access.
Propose answer—A function for proposing an FAQ/answer from an inquiry. A copy of the inquiry is created as an FAQ/answer and can be viewed and edited from the FAQ/Answer Console. The knowledge base engineer then determines its access level, status, language, and visibility.
Proposed—One of four default answer statuses. This answer status indicates that the FAQ/answer has been proposed by a staff member from an inquiry. Answers with a Proposed status are not visible to veterans and other IRIS customers.
Public—One of two default answer status types. FAQs/Answers marked Public may be visible to veterans and other IRIS customers depending on their access level and language.
Resolution time—The maximum allowable time (in hours) set by a service organization for resolving inquiries.
Responder—A VA staff member who is responsible for answering inquiries sent to their IRIS destination
Response time—The maximum allowable time (in hours) set by a service organization for initially responding to new inquiries. Inquiries should be answered within 5 business days of receipt in the IRIS.
Review—This status can be used to notify the knowledge base engineer when a public answer in the FAQ/Answer Knowledge Base needs to be reviewed.
Search index—A matrix that includes a list of important words within a document and their document of origin, allowing efficient searching. In some cases, the matrix is a database table; in other instances, the matrix is a file stored on a hard drive. For a word phrase to be searchable within an inquiry, answer, file attachment, or external document, it must first be indexed.
Session tracking—A feature that tracks IRIS customers' current session history; that is, the pages on the end-user interface that the veteran clicked before submitting a question.
SmartAssistant—IRIS technology that assists the IRIS veterans and other IRIS customers and staff in finding and suggesting possible solutions to a question or issue based on the current session history or the keywords in an inquiry's discussion thread. *See also* Suggested answers.
Solved—One of the inquiry status types; an inquiry marked Solved has been resolved and closed.
Solved count—The method for determining where an FAQ/answer will display in the list of answers. The most useful answers (those with the highest solved count) are pushed to the top of the list, while those with the lowest ratings are moved down on the list.
Staff account—The settings for a staff member/mailgroup authorized to access an IRIS application, including login name, password, profile, group assignment, and email information.

Staff member—Any employee with a staff/mailgroup account and profile authorized to access an IRIS application.
Standard text—Any text or response prepared in advance that can be sent to veterans and other IRIS customers when responding to IRIS inquiries, appended to responses by a business rule. Also called *standard response*. *See also* Response folder *and* Content library.
Suggested answers—A feature in the IRIS that suggests answers to veterans and other IRIS customers' questions when a business rule has been set up to append SmartAssistant suggested answers on email and Ask a Question inquiries. Veterans and other IRIS customers can click a suggested answer to view a possible solution. Suggested answers are also available to responders on the Inquiry Console when editing inquiries.
Tab set—A group of panels on a console that each contain information associated with the record being added, edited, or viewed. The tab set design enables easy access to the information on each panel by clicking the associated tab.
Text searching—A feature in the IRIS that enables veterans and other IRIS customers and staff members to search using their own words instead of choosing values from specific fields. The entered text is compared to the indexed keyword phrases for answers and keywords for inquiries to locate similar keyword phrases.
Toolbar—The bar across a console or window in an IRIS module containing buttons for performing console-specific functions and accessing any IRIS module that is enabled, common consoles, Help, and the Links menu.
Topic—A classification assigned to answers and inquiries. Inquiries can be classified under one main topic and up to five lower-level topics; answers can be classified under multiple main topics and up to five lower-level topics for each main topic.
Topic word—A word that is associated with an answer or document. The associated answer or document will always be displayed to veterans and other IRIS customers when the topic word is included in their search text.
Unresolved—The status code of an inquiry that has yet to have any definitive action taken on it.
Updated—The status code of an existing inquiry that has been updated by the veteran.
View—A unique display of information customizable for certain the IRIS consoles and the IRIS end-user search pages. A view specifies the search options available (fixed and run-time selectable filters) used to select particular groups of records and the output columns that will be displayed.
View grid—The output columns of the currently selected view on an IRIS console and the search pages on the IRIS end-user interface. S*ee* View.
Waiting for Contact—A inquiry status code that must be manually set by an IRIS responder. This code is used when the responder is trying to reach the inquirer by phone and is continuing to try using the telephone.
Web indexer—A search method in the IRIS that allows veterans and other IRIS customers to simultaneously search the knowledge base along with VA Web pages.
Web spider—A software application that reads Web pages and other documents and indexes the content for a search engine, often following hyperlinks from one Web page to another.
Word stemming—A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.
WYSIWYG--what you see is what you get.