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# **VIPR FOR JAWS USERS**

## The Contact Board - Overview

### Background

Visitor Intake Process Re-write (VIPr) is the Web based version of the Visitor Intake Process (VIP). As a Web-based application, you can use JAWS HTML keystrokes for navigation. Please refer to [VIPr for JAWS Users: Quick References](http://sharepoint.ba.ssa.gov/DCHR/OL/EWD/VICurriculum/SSA%20Applications%20-%20Cross%20Program%20Applications/VIPR%20for%20JAWS%20Users-Quick%20References%20%2812-2012%29.docx) for a complete **JAWS HTML Quick Reference**.

We extracted this guide from [VIPr for JAWS Users: Contact Board](http://sharepoint.ba.ssa.gov/DCHR/OL/EWD/VICurriculum/SSA%20Applications%20-%20Cross%20Program%20Applications/VIPr%20for%20JAWS%20Users-Contact%20Board%20%281-2013%29.docx), which was based on the **SSA Visitor Intake Process User Guide**. The standard **Guide** has been modified to incorporate keystrokes and general navigation tips for JAWS users. Due to editor access issues, we based some sections of the manual [generally highlighted in yellow] on predicted behavior rather than actual user experience. If you have corrections or additions to this manual, please contact Greg Gill via email at Gregory.Gill@ssa.gov.

### General

The primary user interface has eight main functions, visually displayed as Tabs on the **Primary Navigation Bar** near the top of the screen. Each of the Tabs is a link that you can access with the **Links List** (**Insert + F7**). Alternatively, each Tab has an associated **VIPr Shortcut Key** (Web-based access keys). For a full listing of **VIPr Shortcut Keys**, please refer to [VIPr for JAWS Users: Quick References](http://sharepoint.ba.ssa.gov/DCHR/OL/EWD/VICurriculum/SSA%20Applications%20-%20Cross%20Program%20Applications/VIPR%20for%20JAWS%20Users-Quick%20References%20%2812-2012%29.docx).

**JAWS Note**: In most Web-based applications, when you activate a button (or perform another task) with a keystroke combination, no further action is required. In VIPr, after pressing access key combinations, you usually have to press the **enter** key to actually activate the button. The access key only moves the virtual cursor to the button.

The Tabs are as follows:

* Contact Board (**Alt + 1**, **ENTER**)
* Appointment Board (**Alt + 2**, **ENTER**)
* Employee Schedule (**Alt + 3**, **ENTER**)
* Broadcast Messages (**Alt + 4**, **ENTER**)
* Reports (**Alt + 5**, **ENTER**)
* Admin (**Alt + 6**, **ENTER**)
* User Guide (**Alt + 7**, **ENTER**)
* Profile (**Alt + 8**, **ENTER**)

### Contact Board

VIPr opens in the **Contact Board** by default. The **Contact Board** consists of several sections, which are similar, but not identical to those in the previous version of VIP.

The **Secondary Navigation Bar** on the **Contact Board** contains several links for key functions you might wish to access from the **Contact Board** (e.g., Queries, Appointments List, Retrieve Interview, etc.) which you can easily access through the **Links List** (**Insert + F7**).

The **Contact Waiting List** section of the **Board** consists of:

* Three filters: **Group Filter** combo box, **Contact Type Filter** combo box, and the **Appointments Filter** combo box. If you change the filter, it remains until you change it again.
* **Refresh** button – You must routinely refresh the screen to load the most recent data.

**JAWS Note**: **F5** is no longer available for refreshing the screen. You can navigate to the **Refresh** button by using **B**, or any of several other methods discussed later in this document.

* **Contact Waiting List** – this table consists of 13 columns:
	+ The column headings are all links. If you execute the link, VIPr modifies the **Contact Waiting List** sort by that column, in ascending or descending order. Execute the same link a second time to reverse the sort order. You may only sort by one variable; there is no secondary sort. The words "Waiting List" follow each column heading to identifying the column as belonging to the **Contact Waiting List** rather than the **Contact Interview List**.

**JAWS Note**: If you do not wish to execute the sort when navigating by column from the **Links List**, use **Alt + M** (**Move to** **Link** button) rather than pressing **Enter**.

* + The first cell of each row is a selection radio button for that particular row. Mark the radio button (press **Spacebar**)for the desired row to take further action with the marked Contact.
* **Contact Info** button (**Alt + C**)
* **Call Contact** button (**Alt + O**): Using this button lets the user take charge of an interview. Activating the button leads the user through a path to verify the caller and gather new information. After completing the path, the contact moves to the Interview List.
* **Pre-Interview** button
* **Forms Completion** button
* **Add Visitor** button (**Alt + V**)
* **Add Appointment** button (**Alt + A**)
* **Duplicate Number** button
* **Print** button (**ALT + P**)

**JAWS Note**: In the Training Region, we discovered that after using a **VIPr Shortcut Key** to access a specific button, the shortcut key worked the first time. However, if you hit the wrong keystroke or selected the wrong contact and subsequently used another **VIPr Shortcut Key** or other navigation key, the keystroke did not always move the virtual cursor to the new control. Use the **Refresh** button to refresh the table and the next shortcut key will work successfully.

**Contact Details**: When you select a contact in the **Contact Waiting List** (i.e., the radio button for that row is marked), the **Contact Details** portion of the screen includes a **Customer Service Record Query** (**CSRQ**) link for the selected contact. The screen also includes a **SSNAP** link for the selected contact (which is not working properly), and details for the selected contact displays in a formatting table with three columns and multiple rows.

**JAWS Note**: Most of the information in the **Contact Details** section is available in the **CSRQ** (link)or **Contact Info** (**ALT + C**)screens, which also contain additional information required for verification of the contact.

The **Contact Interview List** section of the **Board** consists of:

* **Contact Interview List** – this table consists of 12 columns:
	+ The column headings, listed below, are all links. If you execute the link, VIPr modifies the **Contact Interview List** sort to sort by that column, in ascending or descending order. Execute the same link a second time to reverse the sort order. You may only sort by one variable; there is no secondary sort. The words "Interview List" follow each column heading to identifying the column as belonging to the **Contact Interview List** rather than the **Contact Waiting List**.

**JAWS Note**: If you do not wish to execute the sort when navigating by column from the **Links List**, use **Alt + M** (**Move to Link** button) rather than pressing **Enter**.

* + The first column of each row is a selection radio button for that particular row. Mark the radio button (press **Spacebar**)for the desired row to take further action with the marked Contact.
* **Contact Info** button (**Alt + C**)
* **No Response** button (**Alt + N**)
* **Completed** button (**Alt + M**): This button brings the interview to conclusion and removes the Contact from the **Contact Interview List**.
* **Refer** button (**Alt + R**)
* **Print** button (**Alt + P**)

### Calling an In Office Contact

1. Press **B** (button) to move to and select the **Refresh**button on the **Contact Board**; press **ENTER**.

**VIPr Note**:Always refresh the screen before calling any contact in VIPr. This keeps information up-to-date on the **Contact Board**.

**JAWS Note**: You have multiple options for accessing many of the controls in **VIPr**. For example, while pressing **B**, for Button, is the quickest way to access the **Refresh** button, you may select any of the following alternative methods:

* Press **Insert + F5** (Form Field list), **R** (Refresh), **ENTER**.
* Press **Insert + Control + B** (Buttons list), **R** (Refresh), **ENTER**.
* Press **F** to move from field to field until you reach the **Refresh** button. This is likely to be slow as there are many form controls on the page.

**JAWS Note**: If you wish to filter the contacts displayed on the **Contact Board**, move to the combo box filters. For example, you can filter the contacts by **SR Group** from the **Group Filter** combo box.

1. Select the contact from the **Contact Waiting List**. You can use the **Links List** (**INSERT + F7**) to move to the column that will be most useful to you in identifying the contact. For example, **Ticket Number** **Waiting List** (**T**) or **Contact Type Waiting List** (**C**). Press **ALT + M** to move your focus to the selected column in the **Contact Waiting List**. (Alternatively, press **ENTER** to sort by the selected column heading.) Use your table reading keys to identify the row for the desired visitor.

**JAWS Note**:Choose the link for the column heading that is most useful to you (e.g., **Interviewer**, **Ticket Number**, **Contact Name**, etc.). Execute the link and VIPr modifies the **Contact Interview List** sort sorting by that column, in ascending or descending order. Execute the same link a second time to reverse the sort order. You may only sort by one variable; there is no secondary sort. The words "Interview List" follow each column heading to identifying the column as belonging to the **Contact Interview List** rather than the **Contact Waiting List**.

If you do not wish to execute the sort when navigating by column from the **Links List**, use **Alt + M** (**Move to** **Link** button) rather than pressing **Enter**.

**JAWS Note**: **Table Layer Keystrokes** are helpful here: **Insert + Spacebar**, followed by **T**, then use **arrow keys** or other navigation keys to move between columns and rows. See[VIPr for JAWS Users: Quick References](http://sharepoint.ba.ssa.gov/DCHR/OL/EWD/VICurriculum/SSA%20Applications%20-%20Cross%20Program%20Applications/VIPR%20for%20JAWS%20Users-Quick%20References%20%2812-2012%29.docx)for a full listing of JAWS Table Reading Keys and Table Layer Keystrokes.

1. Once your focus is in the row for the visitor you want to select, press **Shift + R** to move to the radio button for the row. (**JAWS Note**: You can also press **Shift + F** or **Shift + Tab** to move to the radio button for the selected row.) Press **Spacebar** to select the visitor.
2. Press **Alt + O**, **ENTER** to press the **Call Contact** button.
3. If the interviewer has an interview already on the **Contact Interview List**, VIPr will display the **Pending Interviews Screen**.
	1. Select the **Yes** button if you wish to accept the interview; or
	2. Select the **Yes** button if you want the number on the display board to update; or
	3. Select the **No** button if you want the number on the display board to remain the same **or if you are calling the visitor contact out of numeric order***.*

**JAWS Note**:The **Pending Interviews Screen** is a "grey screen." Grey screens in VIPr generally contain a message for the user and one or more buttons. Visually, grey screens look like separate pop-up windows, similar to Internet Explorer message windows, but they are actually part of the main window. JAWS may read all or only some of the text on the screen. **INSERT + B** will not read the text on the screen. If you lose focus, you cannot **ALT + TAB** to return to the grey screen. To regain focus, use **Insert + F5**, and then press **End**, followed by **Up arrow**, to read the buttons and text on the screen. Still, JAWS may not read all of the text on the screen. You may also use other keystrokes (e.g., **B** for button, **F** for Form Field) to move to the buttons on the screen, but if the initiating screen contains multiple Form Controls, this may be a slow process.

**Editor Note**: We did not view the Pending Interview Screen in Item 5. Nevertheless, we predict the behavior cited in the preceding steps based upon similar screens.

1. The **Visitor and Claimant SSN** screen displays. Move to the Visitor's SSN field with **F**, or **Insert + F5**. Press **ENTER**. You should hear the **Forms Mode On** tone. Complete the fields as discussed below, then **Tab** to the **OK** button and press **ENTER**.

**VIPr Note**: In order to give the most accurate interview time, call the visitor contact to the interview at this point.

1. If the Visitor and/or claimant’s SSN is known, enter it/them; or
2. If the SSN is unknown, press **Spacebar** to check the checkbox(es) for **Visitor’s** and/or **Claimant’s** **SSN Unknown**. Tab to **OK** and press **Enter**.
3. You must enter a valid Zip Code. If you do not enter a valid Zip Code, you will get an error message, and must complete the Zip Code field prior to proceeding to the next screen.

**JAWS Note**: JAWS is not currently reading the error message and your focus is not in the **Zip Code** field. Use your Form Field keystrokes (e.g., **Insert + F5**) to return to the **Zip Code** field. Type a valid Zip Code. **Tab** to the **Ok** button, and then press **Enter**.

1. If **High Risk Alert** exists on the record, the message dialog will appear before the **CSRQ** screen. JAWS will read the message; use **Insert + B** to re-read the message. Press **B** (**Continue** button); press **Enter** or **Spacebar** to activate the **Continue** button.
2. VIPr displays the **Customer Service Record Query** (**CSRQ**). Each section of the **CSRQ** begins with a Heading. Use **H** to move from section to section of the **CSRQ**. Use **Tab** or **Down Arrow** to read the entries.

**JAWS Note**: Table use is inconsistent on this page. Some of the tables on the page are actual data tables while others are simply formatting tables used to format the page. Formatting tables are generally not useful for navigating.

1. Once you have verified the claimant’s identity, **Tab** to **Ok** or press **B** to move to the **OK** button; press **Enter**.

**JAWS Note**: **Alt + O** is the access key for **OK** on the **CSRQ**, but is not used consistently in other screens.

1. The contact moves to the **Contact Interview List**.

### No Response When Calling an In Office Contact

Follow **Steps 1 – 6** above for[**Calling an In Office Contact**](#_Calling_an_In),andthen to indicate no response:

1. Select the visitor from the **Contact Interview List** using the Links List (**Insert + F7**) to move to the column that will be most useful to you in identifying the visitor.
2. Press **Alt + M** to move your focus to theselected column in the **Contact Interview List**. Use your table reading keys to identify the row for the desired visitor.
3. Press **Shift + R** (or **Shift + F** or **Shift + Tab**) to move to the radio button for the row; press **Spacebar** to select the visitor.
4. Press **Alt + N**, to move to the **No Response** button; press **SPACEBAR** or **Enter**.
5. If you do not want to remove the contact from the **Contact Board**, **Tab** to select **Yes** when you receive the no response grey screen and then press **SPACEBAR**. This will repost the contact to the **Contact Waiting List**; or
6. If you want to remove the interview from the **Contact Board**, **Tab** to select **No**; press **SPACEBAR**.This is a **Left Without Service** interview**;** or
7. **Tab** to select **Cancel**; and then press **Enter**. This will keep the contact on the **Contact Interview List**. (Reminder: Selecting **Cancel** will return you to the **Contact Board** main screen.)

**JAWS Note**: You can always use **B** to move between buttons if you forget the access keys. You must **not** be in **Forms Mode** to use **B** to move through the buttons.

1. To call this interview again, repeat steps 1 – 6 of [**Calling an In Office Contact**](#_Calling_an_In).

**VIPr Note**: If you use the **Appointments Group Filter** to display only your appointments on the **Contact Waiting List**, after selecting **No Response** and returning the Contact to the **Contact Waiting List**, VIPr no longer displays the Contact in your filter list of Appointments. You must change the filter to **All (Appointments and Walk-Ins)** to re-select the Contact for any further action.

### Referring an In Office Contact

1. Select the visitor from the **Contact Interview List**. You can use the Links List (**Insert + F7**) to move to the column that will be most useful to you in identifying the visitor, as discussed above.
2. Press **Shift + R** (or **Shift + F** or **Shift + Tab**) to move to the radio button for the row; press **Spacebar** to select the visitor.
3. Press **Alt + R**, and then **SPACEBAR** or **Enter** to activate the **Refer** button.
4. On the **Topic Selection** screen, press **Insert + F5**, **T** (**Topic Categories** combo box). Alternatively, press **C** to move to the **Topic Categories** combo box. Press **Enter**. You should hear your **Forms Mode** On tone.
5. **Up** and **Down arrow** or use First Letter navigation (e.g., press **C** for **Check Issues**) to choose a topic from the drop down menu in the combo box.
6. **Tab** to the **Refresh** button and press **SPACEBAR** or **Enter**. This will display the **Topic** table for the selected **Category**.

**Editor Note**: VIPr may automatically **Refresh** and display the **Topic** table. This behavior was inconsistent between Training and Production environments.

1. After refreshing, press **T** (**Table**), until you hear the **Topic** column heading.
2. Use your **Table Reading** keys to move to the **Topic Description** column. Use your **Table Reading** keys to move down through the **Topic Description** column. **Table Layer Keystrokes** are helpful here.

**JAWS Note**: The first column in each row of the **Topic** table is a radio button. JAWS associates the radio button with the **Topic** code column. The **Topic Description** column is more meaningful in selecting the topic.

When viewed from the **Radio Button** table (**INSERT + CTRL + R**), no labels were associated with the radio buttons. All were simply identified as “radio button.”

1. When you are on the row for the desired topic, press **Shift + R** (or alternatively, press **Shift + Tab**, or **Shift + F**) to get to the radio button for that row. Press **Spacebar** to select the **Topic**.
2. Press **B** to move to the **Continue** button; press **Spacebar** or **Enter**.
3. **Editor Note**: The editor did not see the following **Referral Information Screen**, but believes it looks like the **Add Visitor Information** or **Modify Visitor Information** screens.

On the **Referral Information** screen, press **Insert + F5**, **G** or press **C** to move to the **Group Filter** combo box; press **ENTER**. You should hear your **Forms Mode On** tone.

1. **Down arrow** or use First Letter navigation to select the group (e.g., **S** for **SR Group**).
2. **Tab** to select the **Refer Interview** button and press **Spacebar** or **Enter**. (You can also use **Insert + F5**, **R**, **Enter** to move to the **Refer Interview** button. Press **Spacebar** or **Enter** again to activate the button.)

**Editor Note**: Need clarification on the screen in focus following Step 13 above. If you are back on the **Contact Board**, press **Alt + R**, **Enter** to activate the **Refer** button.

1. The contact returns to the **Contact Waiting List** until the interviewer calls the contact.

### Calling a Telephone Appointment

**VIPr Note**: You will use the steps for [**Calling an In Office Contact**](#_Calling_an_In) and [**No Response When Calling an In Office Contact**](#_No_Response_When_1).

**Editor Note**: The editor did not review this process. We predict the behavior cited in the steps below based on the behavior of other screens in VIPr.

1. To call a telephone appointment from the **Contact Board**, select the phone appointment and then activate the **Call Contact** button, as discussed in Steps 1-10 of [**Calling an In Office Contact**](#_Calling_an_In).
2. Select the **Interviewer Calling Visitor** radio button from the **In Office Appointment Check-In Option** screen and select **OK**. In this context, VIPr considers the phone contact to be the visitor – even though they are not physically present. SSA will update this label to contact in a future release*.*
3. Dial the telephone appointment phone number.

**VIPr Note**: You should only dial the phone once you have placed the telephone appointment on the **Contact Interview List**.

1. If the appointment contact does not answer, follow the steps for selecting the interview in the **Contact Interview List**.
2. Press **Alt + N**, and then **Spacebar** or **Enter** to activate the **No Response** button. The **Return to Waiting List**grey screen appears.
	1. If you do not want to remove the contact from the **Contact Board**, **Tab** to select **Yes** when you receive the **No Response** grey screen and then press **SPACEBAR**. This will repost the contact to the **Contact Waiting List**; or
	2. If you want to remove the interview from the **Contact Board**, **Tab** to select **No**; press **SPACEBAR**.This is an **Appointment Non-Responder.**

### Calling an In Office Appointment

1. If the in office appointment checked in using the kiosk, VIPr will notify the assigned interviewer [via Communicator?] that the in office appointment has checked in.
2. To call the in office appointment from the **Contact Board**, press **Insert + F7**, **I** (**Interviewer Waiting List**), **Alt + M** (**Move to Link**). This will move your focus to the **Interviewer Waiting** **List** column in the **Contact Waiting List**. Use your table reading keys to move through the table.

**VIPr Note**:Always refresh the screen before calling any contact in VIPr. This keeps information up-to-date on the **Contact Board**.

1. Once your focus is in the row for the visitor you want to select, press **Shift + R** to move to the radio button for the row. (**JAWS Note**: You can also press **Shift + F** or **Shift + Tab** to move to the radio button for the selected row.) Press **Spacebar** to select the visitor.
2. Press **Alt + O**, **ENTER** to press the **Call Contact** button.
3. The **Accept** grey screen will display. Your focus will be on the **Yes** button. Press **Spacebar** to accept the interview. If you lose focus, follow the previously discussed steps for working with buttons in grey screens.
4. The appointment will move to the **Contact Interview List**.

### Calling an In Office Appointment that Failed Self Check-In

1. If a contact is unsuccessful using the self-check-in, the interview posts to the **Contact Waiting List**.
2. Follow steps 2-6 for [**Calling an In Office Appointment**](#_Calling_an_In_1).

### Closing Out an Appointment in the 800# System

**Editor Note**: We did not see the 800# Closeout screen.

1. Follow the steps for selecting a contact from the **Contact Interview List**.
2. Press **alt + N**, and then **spacebar** or **enter** to activate the **No Response** button.
3. On the **Return to Waiting List** grey screen, **Tab** to **No** and press **Spacebar** or **Enter**.
4. The **800# Closeout** screen will appear:
	1. **Tab** to **Yes** and press **Spacebar** or **Enter** to switch over to PCOM and close out the lead; or
	2. **Tab** to **No** and press **Spacebar** or **Enter** to remove the interview from the **Contact Interview List**.
5. If you answered **Yes**, and there is no 800# record existing for the interview a pop-up displays asking if would you like to remove the interview from the **Contact Interview List**.
6. If VIPr locates the record, the **800# Appointment Closeout** screen appears. The closeout options will be pre-filled based on the type of claim. The system closes all issues on the worksheet except for **PROTFL**. You can leave all the issues open by unchecking **Closeout all Worksheet Issues**.

**Editor Note**: Guessing, but **Insert + F5**, **C** (**Closeout all Worksheet Issues checkbox**), **Enter**. Press **Spacebar** if necessary to uncheck the check box.

1. **Tab** to **OK** or **Insert + F5**, **O** (**OK**). Press **Enter** twice to close out the protective filing in the 800# System on the mainframe.

### Completing an Interview

1. If you conduct the interview from the **Add Visitor Information** screen, when the interview is completed, press **Insert + F5, C, Enter** to move to the **Completed** button; press **SPACEBAR** or **Enter** to execute.
2. If you conduct the interview from the **Contact Board**, press **Alt + M** to select the **Completed** button; press **Spacebar** or **Enter**.

**Note**: You cannot complete an interview with **SCREEN** as the interview topic.

# FEEDBACK SHEET

Request to the instructor:

As you use this training package, please document errors, omissions, and revisions and notify us of any required editing. At the completion of this segment, you should mail this form to the address on the next page.

**Source of report**:

Location of training: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Your name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Your phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Timeframes**:

How much time did it take to present this material?

**Topics**:

Is there any material in the lesson that is covered but not relevant to your position that we should remove? If so, what?

Can you identify any topic not covered in this lesson that should be included?

**Complexity level**:

Are there any lessons that appear either too simple or too complex? Which ones? Why?

**Testing**:

How would you rate the usefulness of the tests and exercises?

1 2 3 4 5

Irrelevant Adequate Quite Helpful

Please note your corrections below or attach a photocopy of corrected pages.

Page # Correction Needed

**Comments**:

Use the space below for your comments on how we can improve this material.

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Or email comments to gregory.gill@ssa.gov