Logging Calls in IQ5

Market: House, Senate

Description: The IQ Opinion Center allows user to capture constituent information quickly into IQ, which immediately creates IQ records that can be processed. These instructions teach users how to create new constituent opinion records, search for these records, and manage information in the Opinion Center.

Logging a Call



- 1. Click on the Log Call icon on the left side of the screen.
- 2. The Log Call page is displayed. The left column is where the constituent's contact is selected. The middle column is where the opinion is documented and is associated with IQ fields (e.g., affiliations, issues, bills, batches, etc.). The right column is a set of links and selections to support the documentation of the opinion.

Log Call						
Search by Nameline, Er	mail or Phone		Method In Telephone Call	Date In ✓ 09/18/2024	•	Create: Message 🗸
Prefix First Nan		Last Name				Recent Form Letters A Sample Letter to Agency Requesting Assistance - v.2
Address	City State Type Cell Phone	Zip Q				Agency Inquiry - Agency Letter Auto Letter Bennet Casework Letter
Title	Organization		Select a Batch			Casework Training Letter Digital Privacy Release Form Letter (from within existing case)
Create a New Contact			Issues			Outlook Template Sample General Response Bill Fill In Staff Signature Template - 12pt 1in
			Method Out E-Mail	Assigned To		Common Issues
			Form Letter			INTEREST RATE Issues with interest rates (8) BUD Budget and Economy (8)
					R	esponse Required No Response Cancel

3. The best practice is to start filling out the middle column first to capture the details of the constituents call. The right hand columns information can be used to assist with capturing the details of the call by clicking on the comments to add them in or by clicking on the issues to add those to the call. Below is a break down of each field:

Middle Column:

Method In Telephone Call	Date In 08/29/2023	
<i>Comments</i> Select a Batch		
Issues Method Out E-Mail Form Letter	Assigned To Jonathan Kilgore	

- **Method In:** Select the method in which the opinion originated
- Date In: The current days date will be auto selected.
- **Comments:** Use this field to capture the details of the opinion.
- **Issues:** Select the appropriate issue code to associate with the opinion.
- Select a Batch: If appropriate, select a batch to for the opinion to be placed in.
- Method Out: Select the method to respond to the opinion if a response is required.
- Assigned To: Select the staff the opinion record should be assigned to.
- Form Letter: Choose a letter that can be used to respond to the constituents' opinion.
- **Bills:** If Constituent is calling concerning a bill, select the appropriate one from the list and their position.
- Select a file: If necessary, attach relevant files associated with the opinion.
- Affiliations: Select the appropriate affiliation code(s) to associate with the constituent

Right Column:

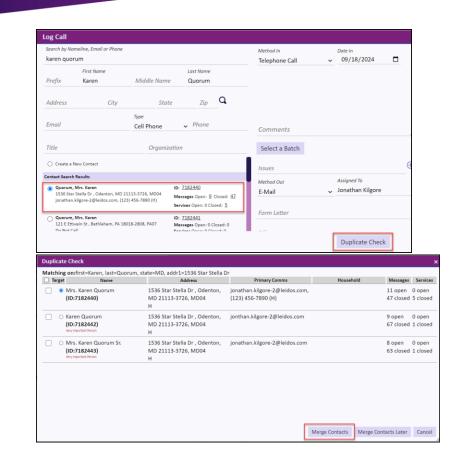
Create Message	• Create: Select which type of record will be created once the opinion is logged. The availability of options can be configured based on a user's role. Contact your IQ Consultant for details.
Recent Form Letters	• Recent Form Letters: This lets you select from a list of Form Letters you have sent recently in response to constituents.
Phone Script for Covid19 issues Thanks for reaching out in regards to your concerns about Covid19. Our office is doing everything we can to ensure our constituents	 Phone Script: This will display if your office added a phone script to the issue code used to tag the opinion. Common Opinions: Based on historical data, IQ displays a list of opinion comments that were previously entered. By clicking on one, IQ will automatically populate the Comments field.
Common Opinions Caller is concerned with in person learning because he is a former teacher who contracted COVID in a classroom. Also, they have two young children who are ineligible for the vaccine. Also concerned with RSV and the flu this season. (2)	 Common Issues: Based on historical data, IQ displays a list of issue codes that were previously used for opinions. By clicking one, IQ will automatically populate the Issue field.

Common Issues
COVID19 Covid19 issues (6)
EDU Education (<u>4)</u>
COVID- HYBRID LEARNI COVID- HYBRID LEARNING (3)
<u>COVID- VACCINE INFO.P COVID- Vaccine Info -</u> <u>Pro (2)</u>
COVID- VACCINE INFO COVID- Vaccine Info (2)
COVID COVID Relief Bill (2)
EDU- HYBRID LEARNING Education (2)

4. After capturing the call, use the left-hand column to match the call with a constituent in your database. If they don't exist, **Create a New Contact** is selected by default and will create a new contact record once the call is logged. *Contacts can be created with just a phone number if necessary.*

Search by	Nameline, Email or	Phone		
Prefix	First Name	Middle Name	Last Name	
Address	City	State	Zip Q	
Email		Type Cell Phone v Phone		
Title		Organization		

a. *Note: If you notice duplicate contact records while searching for the caller, you can select one of those contacts, click **Duplicate Check** at the bottom, and merge the duplicates you have found.



6. Finally, choose one of the following options:

🔶 Intranet Quorum 🄝 leidos

- a. Response Required: If the constituent wants a follow up call, email, etc. choose response required. Make sure you have assigned the call to the correct person first.
- b. **No Response:** If the constituent called to just give an opinion and needs no follow up, choose no response.

Top of Page