

Closing and Reopening a Service Record

Market: House, Senate

Description: These instructions teach users how to close a service record or reopen a closed service record in IQ.

Click the following link to be brought straight to the topic:

Finding and Reopening a Closed Service

Closing a Service Record

- **1.** Find the active service record assigned to you.
- 2. Select Complete.
- **3.** If additional information is needed before the Service can be closed you will be prevented from closing the Service and must click **Change Data** to add the missing information.

	Complete Service	×
New V Change V Report V More V OPEN Casework - DEPT OF STATE for Dr. Stephanie Quorum & Created 10/8/2024 5:01:28 PM by Jonathan Kilgore Summary Activity Data Attachments Logs	Complete Service Route Service 801627 from Process Case Available Routes © Completed Denied Selected Route Information Route to Completion Denied because of missing required fields: Resolution	×
Assigned: Jonathan Kilgore & Release Updated: 11/05/2024 12:39 PM Alert: 11/08/2024 12:00 AM & Description: & Needs passport expedited Codes: & STATE-Department of State Messages: <u>4 Total 3 Open</u>	Open Message Resolution • Leave Open O Complete O Complete with No Response	
Primary Contact Other Contacts ① Dr. Stephanie Quorum 	Change Data ID#801627 Row 1	Complete Step Cancel

4. Complete the information in the **Complete Service** window. Click **Save**.

Complete Service × Route Service 801613 from Process Case Available Routes • Completed Selected Route Information... Route to Completion Send Info Copies Closing Note... Closed Status Code...

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Finding and Reopening a Closed Service

Note: You must have specific security permissions to reopen a closed Service. Talk to your IQ Consultant if you don't have permission and need it enabled.

- 1. Search for your closed service record.
- 2. Select either in the detail record in the bottom left corner, or in the service name in the list view of your services.
- 3. Select Reopen.
- **4.** In the Reopen Service window, select **Reopen** \rightarrow **Save**.

Reopen Service	
Reopen	○ Change Status

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