

Requesting and Granting Approval of a Form Letter

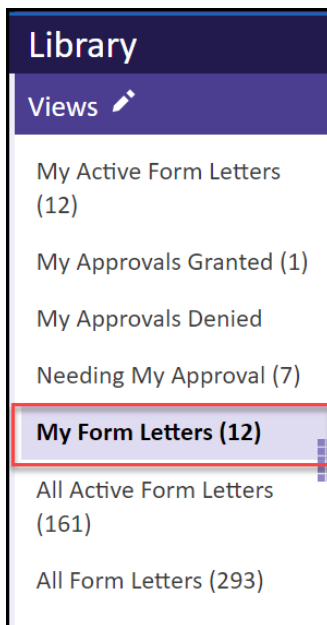
Market: House, Senate


Description: Form Letters are customizable letters that you can use/reuse to respond to messages that are similar in nature; thus, reducing the need to create a new response to individual messages that are similar. After completion, these Form Letters can be sent for approval from one or more IQ users in your office, ensuring the quality of the Form Letter.

[Viewing list of Form Letters that need approval](#)

Requesting Approval for a Form Letter

1. Navigate to **Library** → **My Form Letters**. Select a letter and click “Edit” to open letter.



2. On the Draft Form Letter page, click the  and select **Request Approval**.

Draft
Form Letters

November24 Form Letter v.1


Created 11/6/2024
Revised 11/6/2024

General Details Fill-Ins Format Discuss L

	All	Open	Closed
Messages	0	0	0
Targeted Mail	0	0	0
Newsletter	0	0	0

[Website](#)

- Copy
- Add New Version
- Request Approval**
- Inactive
- Preview
- Quick Report
- Delete

Edit Check Out to OneDrive Approve 

3. Click into the “By” field name and select an approver. Then click **Update**.

Form Letter Status Update ×

New Status Request Approval

By

_____ ▼

Update **Cancel**

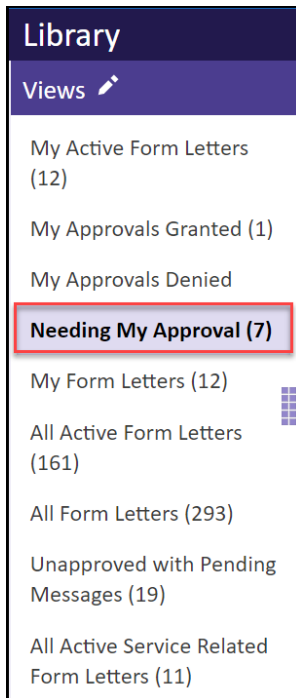
- Any Form Letter Approver
- Mohammad Ghaznavi
- Walter Hocketstaller
- Trinh Nguyen
- Bella Strom
- Jonathan Kilgore
- Joy Betaharon
- Driss Mendith

Inactive Copy Delete ID#101212 Row 1

Viewing list of Form Letters that need approval

IQ will send an alert in IQ (and in MS Outlook, if configured) to the approver regarding the Form Letter. The approver can use these steps to view these requests.

1. Navigate to **Home → Library → Needing My Approval** view.



2. The list of letters requiring approval is displayed. Select the **Form Letter** to review.

3. On the Form Letter page, select **Approve**. To deny a request, select **Deny**.



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