

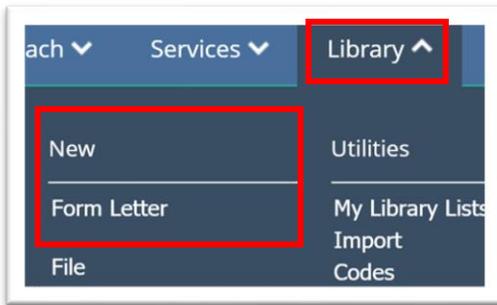
## Requesting and Granting Approval of a Form Letter

**Market:** Federal/State/Local, House, Senate

**Description:** Form Letters are customizable letters that you can use/reuse to respond to volume of messages that are similar in nature; thus, reducing the need to create a new response to individual messages that are similar in nature. 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.

### Requesting Approval for a Form Letter

1. Navigate to **Library > New > Form Letter**.



2. For instructions on creating a Form Letter, see [Creating a Form Letter](#).
3. On the Form Letter page, set the **Status** of the Form Letter to **Request Approval**. Then select an approver. Check the **Assignable** box as this enables you to assign the Form Letter to current messages, services, campaigns, bills or other types of records while awaiting for its approval. Once the Form Letter is approved, the corresponding records are ready to be sent.

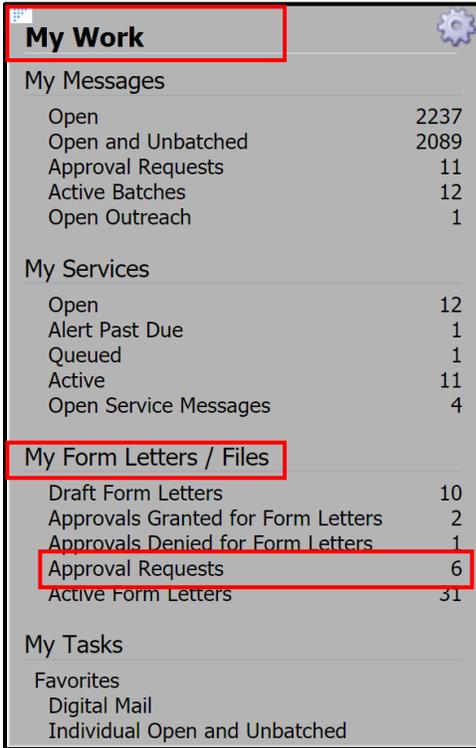


4. Click **Save**.

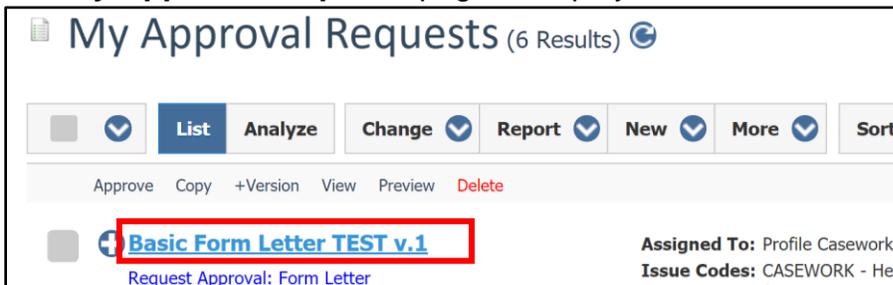
**Viewing list of Form Letters that need approval**

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 > My Work Summary tile > My Form Letters/Files > Approval Requests.**



2. The **My Approval Requests** page is displayed. Select the **Form Letter** to review.



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

The screenshot shows a 'Form Letter' interface with several tabs: 'General', 'Fill-Ins / References (0)', 'Format', 'Messages (0)', and 'Log (18)'. The 'Form Letter' title is centered. Below the title, there are fields for 'Name' (Basic Form Letter TEST), 'Type' (Form Letter), and 'Issues' (CASEWORK - Help With a Federal Agency). There are buttons for 'Email View' and 'Printed View'. A dropdown menu for 'Request Approval' is open, showing options: 'Approved', 'Draft', 'Inactive', 'Request Approval', and 'Denied Approval'. The 'Approved' option is highlighted with a red box.

### Viewing Status of Form Letter Approval Requests

The requestor can use these steps to view the status of his/her Form Letter approval requests.

1. Navigate to **Library > Find Form Letters > My Form Letters**.

The screenshot shows a navigation menu with the following items: Home, Contacts, Messages, Outreach, Services, Requests, and Library. The 'Library' item is highlighted with a red box. Below the navigation menu, there is a grid of links. The 'Find Form Letters' link is highlighted with a red box. Other links include 'Find Files', 'New', 'Utilities', 'My Active Form Letters', 'My Active Files', 'Form Letter', 'My Library Lists', 'My Form Letters', 'My Files', 'Form Letter Template', 'Import', 'My Checked Out Form Letters', 'My Checked Out Files', and 'Codes'.

2. Select **Filters > Requested Approvers**.

The screenshot shows a filter section titled 'Requested Approver (2)'. There are two filter options, both with checked checkboxes: 'Jonathan Kilgore Requested (1)' and 'Not in an Approval Status (2)'.