Assigning and/or Reassigning a Service Record

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to reassign an existing service record to another user or group of users. in IQ.

- 1. Navigate to Services > Find Services > My Open.
- 2. The results display all active services assigned to you. Select the service record.
- **3.** Click the **Pencil** icon.



4. IQ opens a new window that allows you to select which user or group of users you can (re)assign the service.

| Reassign Service 800952 | | | |
|----------------------------|--------------------|--------|---|
| Assign To | | | |
| Select users and groups | | 0 | |
| Subject (optional) | | | |
| Service Reassignment Alert | | | |
| Note | | | |
| | | | |
| | | | |
| | | | 2 |
| Reassign & Alert | Reassign w/o Alert | Cancel | |

5. Option 1

Click **Reassign & Alert** to complete the reassignment process and send an IQ alert to the selected user(s).

Option 2

Click **Reassign w/o Alert** to complete the reassignment process without sending an IQ alert to the selected user(s).