

Closing and Reopening a Service Record

Market: Federal/State/Local, House, Senate

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

Closing a Service Record

1. Find the active service record assigned to you.
2. Click **Edit**. The service record template is opened.

Detail 

Status: OPEN  **Edit**

Assigned: Profile Caseworker

3. Review and confirm the information. Click **Save**.

Description:
Needs assistance with social security checks.

Opened: 11/17/2021 1:18pm **Alert:** 11/24/2021 10:00am

Service Codes:
* SSA - U.S. Social Security Administration

General Information

Case Status: * Active **Last Contacted:** 11/17/2021 **Contact Method:** Phone

Case Information **Save** **Save and Return** **Save without Closing** **Cancel**

4. Click the pencil icon next to **Open**.

Detail	
Status:	OPEN 

5. The routing window appears on the screen. Enter the closing notes.

Route Service 800947 from Process Case	
Available Routes	
<input checked="" type="radio"/> Completed	
Selected Route Information...	
Routes to Completion with the status of CLOSED	
<input type="checkbox"/> Send Info Copies	
Closing Note...	
<input type="text"/>	
Close Service	Cancel

6. Click **Close Service**. The service record displays a *Closed* status.

Status:	CLOSED 
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Finding and Reopening a Closed Service

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

1. Navigate to **Services > All Recently Closed**.

Services 
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- Find Services
- My Open
- My Open By Type
- My Recent
- My Recently Closed
- All Open
- All Open By Type
- All Overdue
- All Recent
- All Recently Closed
- All By Contact

2. Select the service record.
3. Click the **Pencil** icon next to **CLOSED**.

Detail

Status: CLOSED **Closed:** 2/18/2021 - 4:18pm Edit

Assigned: Profile Caseworker

4. Select the appropriate option.

Reopen Service or Change Closed Status

Reopen Service

Change Status

Cancel

Option – Reopen a Service. This reopens the service record. Modify the record information and close the record when the process is complete.

Option – Change Status. This displays a window that lists the different types of closing statuses. Select the new closing status.

Making Changes to a Closed Service

1. Find the Closed Service.
2. Click one of the following options:
 - a. **+Note:** This allows you to add a note to the closed Service.
 - b. **+Code:** This allows you to add forgotten Service Codes to the Closed Service.

- c. **+Info Copy:** This allows you to send an Info Copy related to the Closed Service.
- d. **+Attachment:** This allows you to add an Attachment to the Closed Service.
- e. **+Library File:** This allows you to add a forgotten Library File to the Closed Service.
- f. **Report:** This allows you to run a report on the activity conducted in this Closed Service.

Reopen

[+Note](#)
[+Code](#)
[+Info Copy](#)
[+Attachment](#)
[+Library File](#)
[Report](#)
[Delete](#)

 (ID# 801307) 1

+ Casework

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Vienna, VA 22182-5255
H: (123) 456-7890
alyssa@fakeemail.com
Frequent Writer - High Volume, IQ User, US Vet, Newsl...

Description: Needs help with VA benefits

Assigned: Profile Caseworker

Updated: 8/12/2021

Codes: SSA - U.S. Social Security Administration, USCIS - U.S. Citizenship and Immigration Services USCIS, VA - Department of Veterans' Affairs

Other Open: [17 Other open services for this contact](#)

[CLOSED.FAV](#)

8/12/2021 Age: 0