

## Completing a Service Template

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

**Description:** These instructions teach users how to complete a service template.

### Completing the Detail Page

As soon as you create a new Service, regardless of type, the user is redirected to the **Detail Page**, which is the template that is customized for that service.

1. Enter in the **Description** field the details of the Casework (or other service if there is a description field there).
2. Click in the first box of the **Alert** field to select a date that you want to be Alerted on to follow up with this Service. Click in the second box to type in the time the Alert should occur.
  - a. **Note:** if you leave the time field blank, it will default to midnight on the date that you have chosen.
3. Type in a **Service Code** to indicate which Federal Agencies (if any) are going to be involved in this Service.
  - a. **Note:** For a **Casework** service, you must have **at least one** service code in this field to complete the service. For other Services, such as a **Flag Request** there may be a unique service code that appears for you.

4. The fields below are unique to **Casework**. Fill out the fields as you have the information. Remember these fields will change based on the Service chosen. You do **not** need to fill out all these fields at the time the Service is opened.

The screenshot shows two sections of a web form. The top section, titled 'Case Information', contains several input fields: 'Case Status' with a plus icon, 'Last Contacted', 'Contact Method', 'Intake Method', 'Agency Involved' with a plus icon, 'Other Agency', 'Case #' with a 'Minimize details' dropdown set to 'No', 'Claim #' with fields for 'Loan #', 'Birthdate', and 'Country of Birth', 'SSN #', 'Alien #', 'Receipt #', 'Passport #', 'Branch of Service', and 'Military Rank'. Below these fields is a green bar with the text 'Explanation of Problem (as recommended)' and five buttons: 'Save', 'Save and Return', 'Save and Route', 'Save without Closing', and 'Cancel'. The bottom section, titled 'Case Closure Information', has a dropdown menu set to 'External', 'Constituent Savings: \$' with an input field, 'Success Story:' with a dropdown, and a large 'Resolution:' text area. At the bottom of this section is another green bar with the same five buttons: 'Save', 'Save and Return', 'Save and Route', 'Save without Closing', and 'Cancel'.

5. Click **Save**.

- a. **Save and Return:** Saves the information entered in the details page and returns you to the previous screen you were on.
- b. **Save and Route:** Saves the information entered and “routes” the Service to it’s next step. Only click this when you are ready to move the Service to it’s next step.
  - i. **Note:** For a Casework Service, there is only one step, so selecting this option moves the Service to Completion.
- c. **Save without Closing:** Saves the information entered in the Details Page without closing it. This allows you to save your work as you go.

*Attaching and Removing Contacts*

1. If the Service was created from the Contact Record the **Primary Contact** field will have that Contact attached already. If the Service was created anywhere else, click the **+** icon to search and attach the Primary contact.
  - a. **Note:** There can only be **one** Primary contact for each service.

**Primary Contact**  
**Dr. Alyssa M. Quorum** (No Role)

7990 Quantum Dr, Ofc 1  
 Vienna, VA 22182-5255  
 H: (123) 456-7890  
 jonathan.kilgore-2@leidos.com  
 alyssa@fakeemail.com

Newsletter Subscriber, Frequent Writer -  
 High Volume, IQ User, US Vet

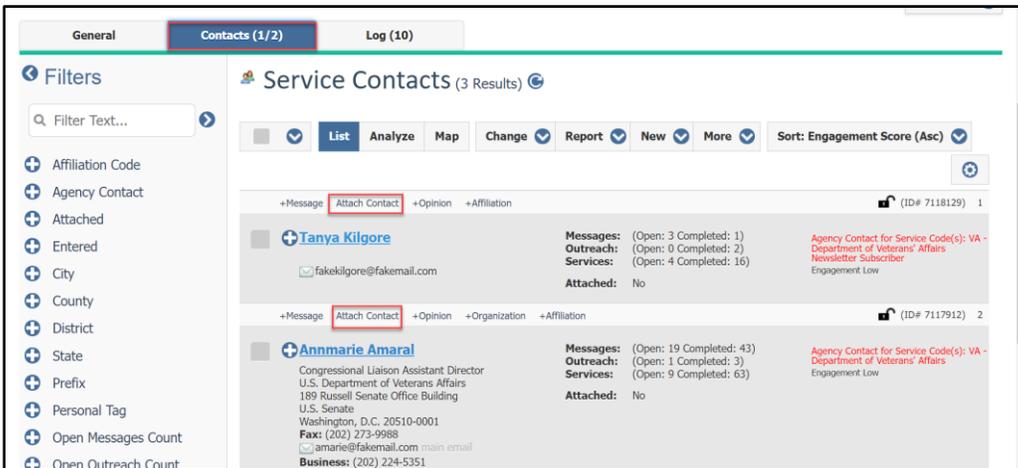
2. Click the **+** icon next to **Other Contacts** to search for Other Contacts associated with the service and attach them.

**Other Contacts**   

None

3. To attach **Agency Contacts**, scroll to the top of the Service and click on the **Contacts** tab. There will be **Agency Contacts** associated with the Service in gray on this page. Click **Attach Contact** above their names if they will be Contacts you reach out to while resolving the Service.

a. **Note:** These contacts only appear if you entered in one or more **Service Codes** in the **Details Page**.



The screenshot shows a web interface with a 'Contacts (1/2)' tab selected. On the left is a 'Filters' sidebar with various criteria like Affiliation Code, Agency Contact, etc. The main area is titled 'Service Contacts (3 Results)'. It features a toolbar with buttons for List, Analyze, Map, Change, Report, New, and More. Below the toolbar, there are three contact entries. The first entry is for 'Tanya Kilgore' with an 'Attach Contact' button highlighted in red. The second entry is for 'Annmarie Amaral', also with an 'Attach Contact' button highlighted in red. Each entry includes contact details, statistics for Messages, Outreach, and Services, and an 'Attached' status.

4. To indicate a Contacts **Role** in the service, click the  icon next to **No Role**. Select the appropriate Role(s) from the list.

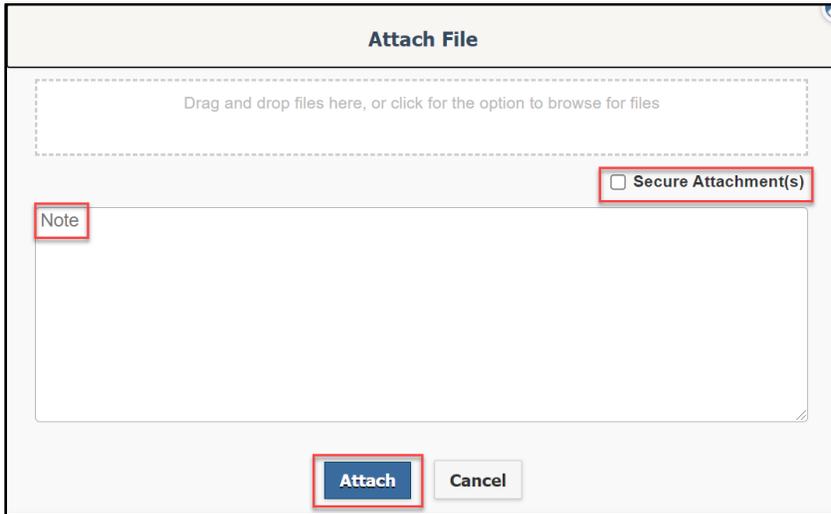
a. **Note:** These roles are customizable and can be edited by your IQ Consultant.

*Adding Attachments*

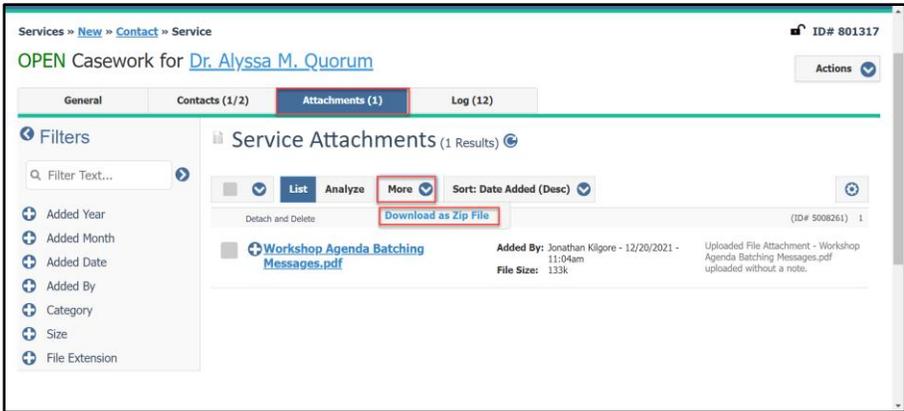
1. Click the  icon in the **Attachments** field. This opens the **Attach File** dialogue.



2. Click into the dotted box to open your computers file explorer and double click on the file you wish to attach.
  - a. **Note:** you can also drag and drop your file into the dotted box to attach the file.
3. Click **Secure Attachment** to enable Record Security on the attached file. This will ensure only certain IQ users can view, edit, or have no access to the attachment. Leave unchecked if there is no need for security on the attachment.
4. Type in a note about the attachment to provide detail about what the attachment is.
5. Click **Attach**.

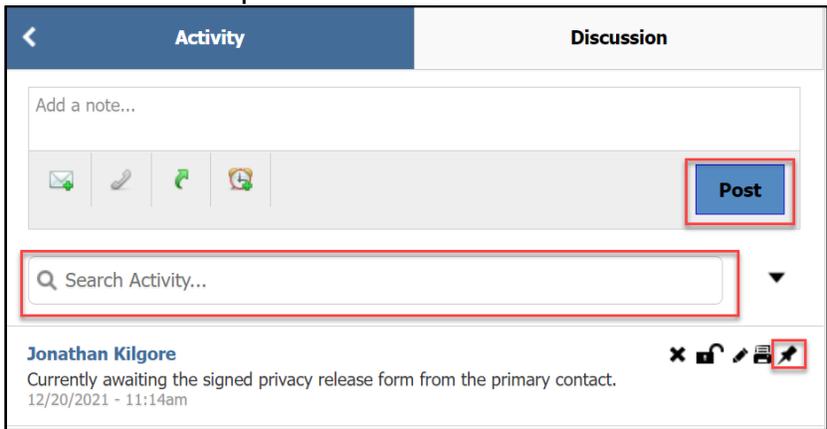


6. Review your attached documents in the **Attachments Tab** at the top of the service.
  - a. **Note:** You can download attached files as a .zip file by selecting them in the attachments tab, clicking **more > download as .zip**.



*Adding Notes*

1. Within the Open Service, click on the field directly under **Activity** and type in your **Note**.
  - a. If have recently used a different Tool underneath Activity, click the  icon to get back to the **Add a Note** field.
2. Click **Post**.
3. Review these Notes underneath the **Search Activity** bar at any time. Click the  icon to **Pin** the note to the top of this section.



*Logging Phone Calls*

1. Click the  icon to **Log a Phone Call** for the Service.
2. Type in the name of the **Contact** that you are calling/have received a call from.
  - a. **Note:** Press the Space Bar on your keyboard after clicking into the field to review a list of Contacts associated with the Service. Select the appropriate Contact from this list.
3. Select the **Call Type** by clicking on the dropdown field. Select **Incoming** or **Outgoing** depending on the nature of the call.
4. Type the details of the call in the field that says **Add a note**.
5. Click **Save**.

*Creating Custom Alerts/Sending an Information Copy*

1. Click the  icon.
2. The **Send Information Copy** dialogue appears. Click into the **User** field to select the User(s) this will be sent to.
  - a. **Note:** If creating a **Custom Alert**, choose yourself as one of the Users in this field.
3. Click into the **Group** field if there is a Group of Users that will be receiving this Information Copy or Custom Alert.
4. If sending a **Custom Alert**, check the **Send Alert Later** box.

- a. The **Send On** fields now appear. Click into the **Date** and **Time** fields to choose when and at what time the Customer Alert will send.
- b. In the **Subject** line, enter the name of the Alert. For Example, "Call Primary Contact today".
- c. Type into **Message** the details of the Alert. For Example, "Primary Contact has not been contacted in 30 days as of this alert. Call today with update."
- d. Click **Send**.

5. If sending an **Information Copy** type in a **Subject** line that will appear in the Users email.
  - a. Type into the **Message** field the body of text that will be sent to users.
  - b. Click **Send**.

A screenshot of a message composition window. It features a 'Subject' field at the top left, a large 'Message' text area below it, and 'Send' and 'Cancel' buttons at the bottom right.

*Add/Remove a Monitor*

1. Click the .
2. This opens the **Edit Service Monitor** dialogue. By default, it will start on the **Add Monitor** tab.
3. Choose whether to **Alert** the monitor on Status Change and whether to Alert **Until Service is Complete** or **Until Current Step is Complete**.
4. Select the **User(s) or Group(s)** that will be Monitors for this Service.
5. Type into the **Alert Text** field what the Alert should say when sent to the Monitor(s).
6. Click **Add**.

A screenshot of the 'Edit Service Monitor' dialog box. The title bar reads 'Edit Service Monitor'. There are two tabs: 'Add Monitor' (selected) and 'Remove Monitor'. Under the 'Add Monitor' tab, there are three sections:
 

- Alert Options:** A checked checkbox for 'Alert on Status Change', and two radio buttons for 'Until Service is Complete' (selected) and 'Until Current Step is Complete'.
- User Selection:** A search box containing 'Jonathan Kilgore' and 'Lori Zeoli' with a magnifying glass icon.
- Group Selection:** An empty search box with a magnifying glass icon.
- Alert Text:** A text area containing the text 'This Case is now closed.'

 At the bottom, there are 'Add' and 'Close' buttons.

7. If **Removing a Monitor** click the **Remove Monitor** tab.
8. Click the box next to the User(s) or Group(s) you wish to remove as a monitor.
9. Click **Remove**.

### Edit Service Monitor

[Add Monitor](#) [Remove Monitor](#)

You can only view or remove yourself and groups to which you belong.

#### Monitors for Jonathan Kilgore

✓	Scope	User	Group	Alert	Alert Text
<input type="checkbox"/>	SERVICE	Jonathan Kilgore		Yes	This Case is now closed.

[Remove](#) [Close](#)