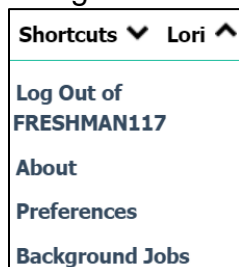


## Tracking Your Assigned Service Records Modified by Other Users

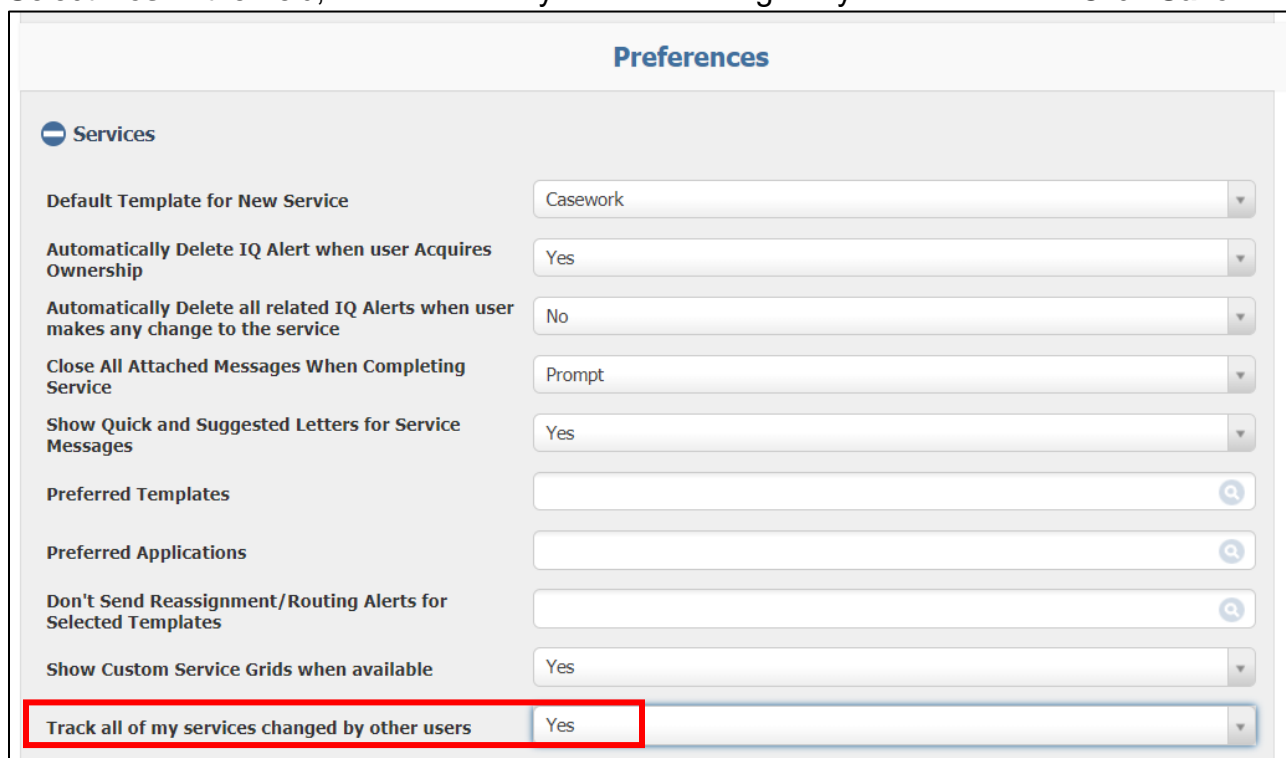
**Market:** Federal/State/Local, House, Senate

**Description:** These instructions teach users how to turn on the setting that allows users to identify which of their assigned service records were modified by other users and clearing notification settings after reviewing this information.

1. Navigate to **Preferences**. This menu is located under your username on the top right corner.



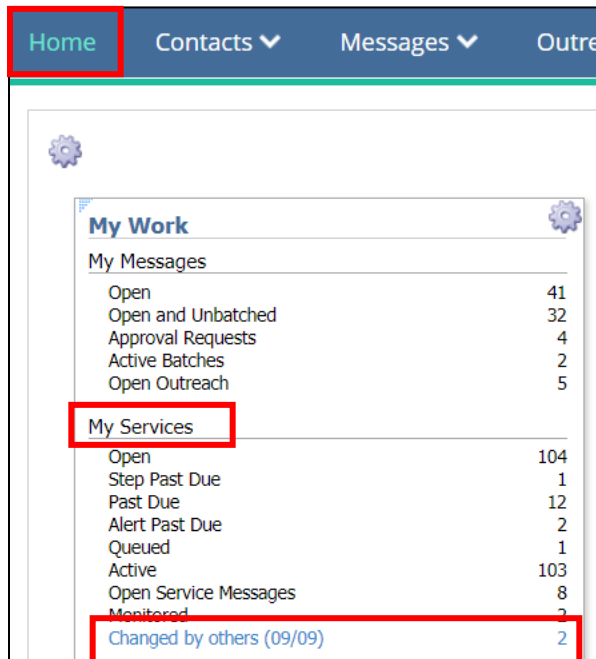
2. Expand **Services**.
3. Select **Yes** in the field, "Track all of my services changed by other users.". Click **Save**.



A screenshot of the 'Preferences' form. The title 'Preferences' is at the top in blue. Below it, there is a section titled 'Services' with a minus icon. The form contains several settings, each with a label and a dropdown menu. The settings are: 'Default Template for New Service' (set to 'Casework'), 'Automatically Delete IQ Alert when user Acquires Ownership' (set to 'Yes'), 'Automatically Delete all related IQ Alerts when user makes any change to the service' (set to 'No'), 'Close All Attached Messages When Completing Service' (set to 'Prompt'), 'Show Quick and Suggested Letters for Service Messages' (set to 'Yes'), 'Preferred Templates' (empty), 'Preferred Applications' (empty), 'Don't Send Reassignment/Routing Alerts for Selected Templates' (empty), and 'Show Custom Service Grids when available' (set to 'Yes'). The last setting, 'Track all of my services changed by other users', is highlighted with a red box and is set to 'Yes'.

4. Navigate to the **Home** module. Confirm that the **My Work Summary Tile** is visible.

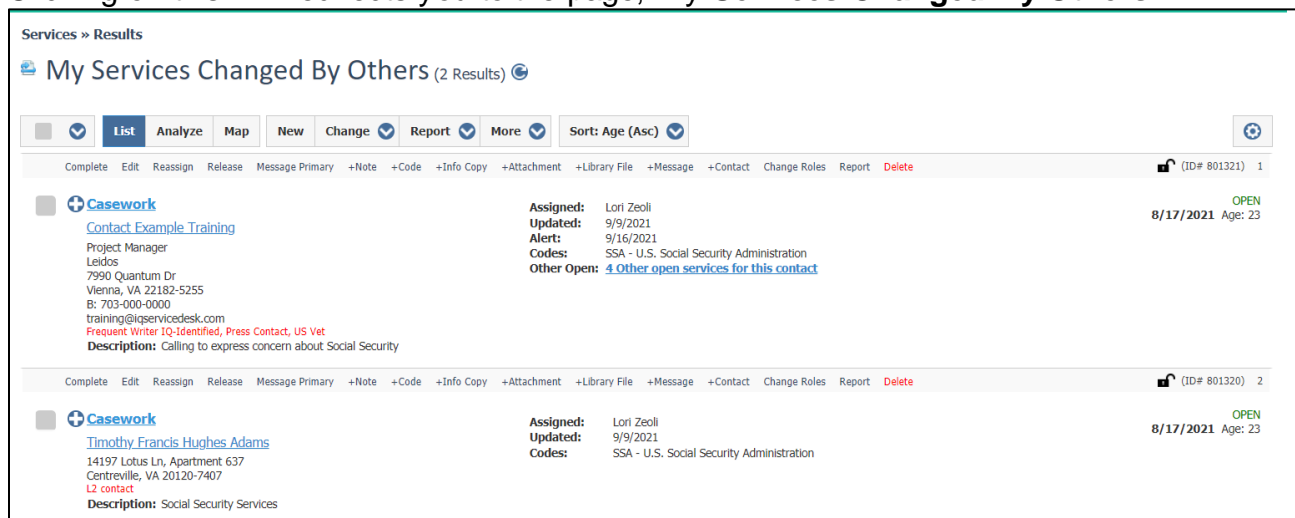
5. In the **My Work Summary Tile**, the **Changed by others** link displays the number of service records assigned to you but were modified by other users. The date displayed represents the oldest date a service record assigned to you has been modified by other users.



My Messages	
Open	41
Open and Unbatched	32
Approval Requests	4
Active Batches	2
Open Outreach	5

My Services	
Open	104
Step Past Due	1
Past Due	12
Alert Past Due	2
Queued	1
Active	103
Open Service Messages	8
Monitored	2
<a href="#">Changed by others (09/09)</a>	2

6. Clicking on this link redirects you to the page, **My Services Changed By Others**.



Services » Results

**My Services Changed By Others** (2 Results)

Complete Edit Reassign Release Message Primary +Note +Code +Info Copy +Attachment +Library File +Message +Contact Change Roles Report Delete (ID# 801321) 1

**Casework**  
[Contact Example Training](#)  
 Project Manager  
 Leidos  
 7990 Quantum Dr  
 Vienna, VA 22182-5255  
 B: 703-000-0000  
 training@lqservicesdesk.com  
 Frequent Writer IQ-Identified, Press Contact, US Vet  
 Description: Calling to express concern about Social Security

Assigned: Lori Zeoli  
 Updated: 9/9/2021  
 Alert: 9/16/2021  
 Codes: SSA - U.S. Social Security Administration  
 Other Open: [4 Other open services for this contact](#)

8/17/2021 Age: 23 OPEN

Complete Edit Reassign Release Message Primary +Note +Code +Info Copy +Attachment +Library File +Message +Contact Change Roles Report Delete (ID# 801320) 2

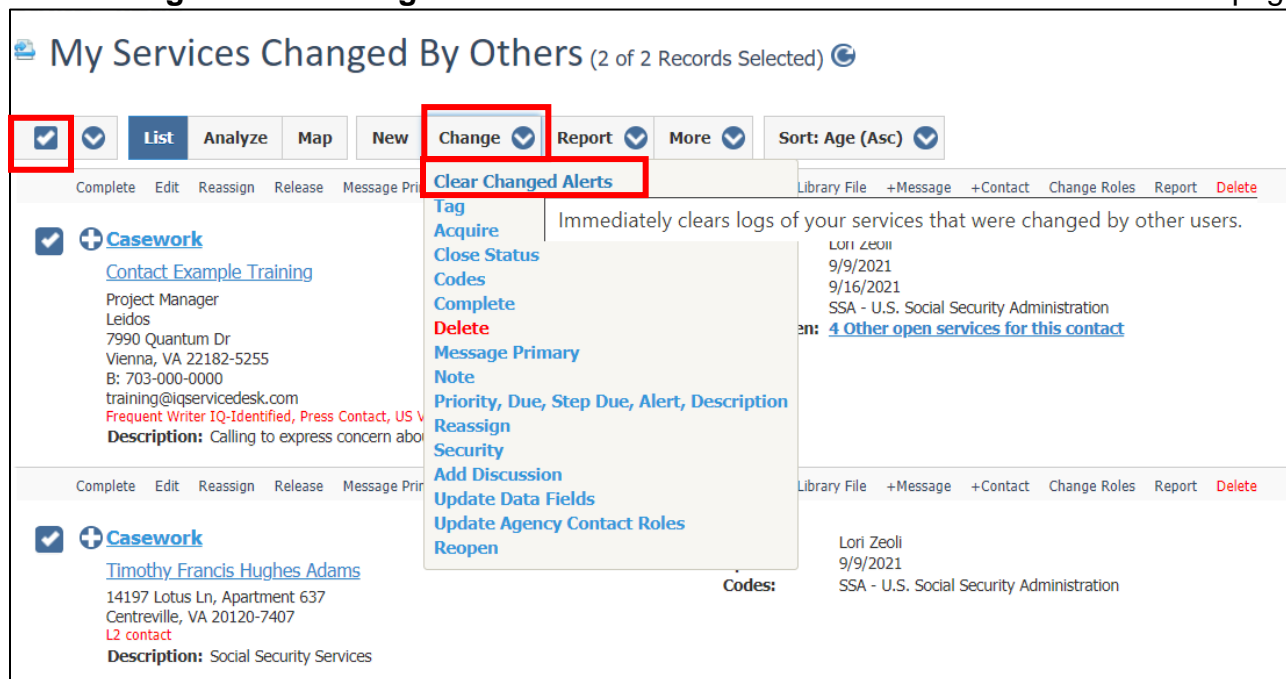
**Casework**  
[Timothy Francis Hughes Adams](#)  
 14197 Lotus Ln, Apartment 637  
 Centreville, VA 20120-7407  
 L2 contact  
 Description: Social Security Services

Assigned: Lori Zeoli  
 Updated: 9/9/2021  
 Codes: SSA - U.S. Social Security Administration

8/17/2021 Age: 23 OPEN

## Clearing service records alert notifications

1. Once you have reviewed these service records, you can clear the notifications. Select the records.
2. Click **Change \ Clear Changed Alerts**. The selected records will be deleted from this page.



The screenshot shows the 'My Services Changed By Others' page with 2 of 2 records selected. The 'Change' button is highlighted, and the 'Clear Changed Alerts' dropdown menu is open, showing options like Tag, Acquire, Close Status, Codes, Complete, Delete, Message Primary, Note, Priority, Due, Step Due, Alert, Description, Reassign, Security, Add Discussion, Update Data Fields, Update Agency Contact Roles, and Reopen. The first record is for 'Casework' with contact 'Example Training' and the second is for 'Casework' with contact 'Timothy Francis Hughes Adams'.

3. Navigate to the **Home** module. Confirm that the **My Work Summary Tile** is visible.
4. In the **My Work Summary Tile**, the **Changed by others** link now displays only the records that have not been viewed nor cleared.