

IQ5 for Transitioning IQ4 Caseworkers

Market: House, Senate

Description: This guide will walk a transitioning Caseworker through configuring and utilizing IQ5. This will have 2 main sections: **Setup** and **Casework Process**.

Click the following links to be brought straight to the topic:

[Creating a Case](#)

[Attaching and Removing Contacts](#)

[Adding Attachments](#)
[Logging Phone Calls](#)

[Adding Notes](#)
[Creating Custom Alerts/Sending an Information Copy](#)

[Add/Remove a Monitor](#)

[Closing the Case](#)

[Finding and Reopening a Closed Service](#)

[Managing Cases from the List View](#)

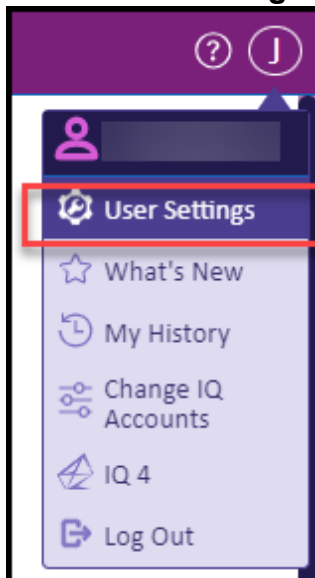
[Utilizing Outlook in IQ5](#)

[Sending a Message](#)

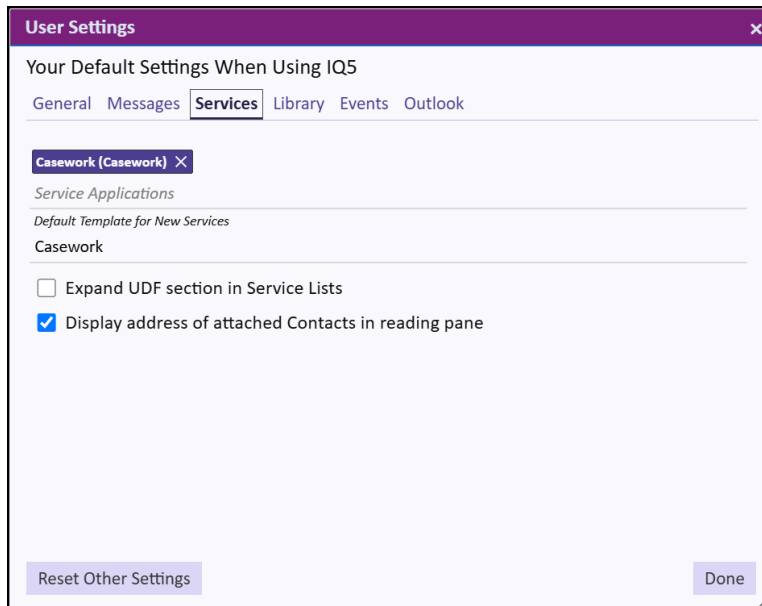
[Sending a Quick Email](#)

Setup

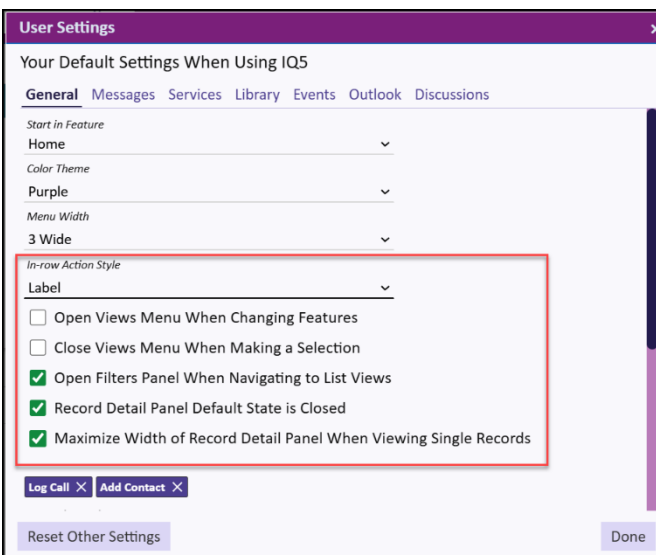
1. First, set up your User Settings. Click on your initial in the upper right-hand corner. Then, select **User Settings**.



- Click on the **Services** tab and make the following changes so your settings match the image below. **Note:** More Services than Casework can be added to the Service applications section. If there is a Service you wish to add that is not displayed, reach out to your IQ Consultant for assistance.



- Click on the **General** tab and make the following changes so your settings match the image below.




- When viewing lists of records, click the “X” button in the top right of the reading pane (if open) to close it out. This will allow for a screen that looks like IQ4 as seen below:

| Primary Contact | Dates | Status |
|---|--|--|
| #1 802389 - Casework Congressman John Quorum Incomplete Address | Created: 10/7/2025 Updated: 11/5/2025 | Status: OPEN Current Step: Process Case Assigned: Jonathan Kilgore |
| #2 802388 - Casework Service Code: VA-Department of Veterans' Affairs Description: Test | Created: 10/2/2025 Updated: 10/2/2025 | Status: OPEN Current Step: Process Case Assigned: Jonathan Kilgore |
| #3 802377 - Casework Mr. Johnny C. Bravo ZZ Other Open 12134 Monument Dr Fairfax, VA 22033-5531 | Created: 9/25/2025 Updated: 9/25/2025 | Status: OPEN Current Step: Process Case Assigned: Jonathan Kilgore |
| #4 802376 - Casework | Created: 9/25/2025 Updated: 9/25/2025 | Status: OPEN Current Step: Process Case |

5. The same Homepage tiles you utilized in IQ4 are available in IQ5. Be sure to add any to your homepage that are not already there such as:
 - a. My Work Summary
 - b. Alerts
 - c. My Open Services
 - d. My due/alert Services
6. This completes your setup.

Casework Process:

Creating a Case

1. Search for a contact record using the **Find and Add a Contact** icon .
2. Click the radio button next to your existing Contact or, if the Contact does not exist, add in the rest of their information and click Add Contact.

Find or Add Contact

Search for Contact
Search by Name, Email or Phone

roy quorum

| Prefix | First Name | Middle Name | Last Name |
|--------|------------|-------------|-----------|
| | Roy | | Quorum |

Address

City State Zip

Email Type Phone

Title Organization

Search Affiliation

Quorum, Lt. Roy
12134 Monument Dr, Fairfax, VA 22033-5531
roy.quorum@fakemail.com, (098) 765-4321 (H)
Newsletter Subscriber

ID: 7183868
Messages Open: 4 Closed: 20
Services Open: 7 Closed: 14

Add Contact Cancel

3. Click the **Add Service** button when viewing the Contact.

The screenshot shows the 'All Contacts' interface. At the top, there's a search bar with 'Find' and a 'Row 1 - ID 7183868' indicator. Below the search bar, there are tabs for 'New', 'Change', 'Report', and 'More'. The main profile area for 'Lt. Roy Quorum' includes an email address 'leidoskmtteam@gmail.com' and a 'Newsletter Subscriber' status. The 'General' tab is active, showing 'Email Addresses', 'Phone Numbers', 'Social Networks', and 'Home' information. A 'Business' table is also present, showing counts for 'All', 'Open', 'Closed', and 'Recent' across 'Messages' and 'Outreach'. At the bottom, there are buttons for 'Edit', 'Add Message', 'Add Service' (highlighted with a red box), and 'Add Event'.

| | All | Open | Closed | Recent |
|----------|-----|------|--------|--------|
| Messages | 39 | 5 | 34 | 10 |
| Outreach | 6 | 5 | 1 | 0 |

4. Select the appropriate service and click the **Continue** button.
 - a. ***Note:** If you do not see the Service you need listed, click on **Add to New Any Template**.

The screenshot shows a dialog box titled 'Create new Service with this Contact as Primary Person'. It prompts the user to 'Please select an option' from a list of services. The 'Add to New Any Template' option is selected. At the bottom, there are 'Continue' and 'Cancel' buttons.

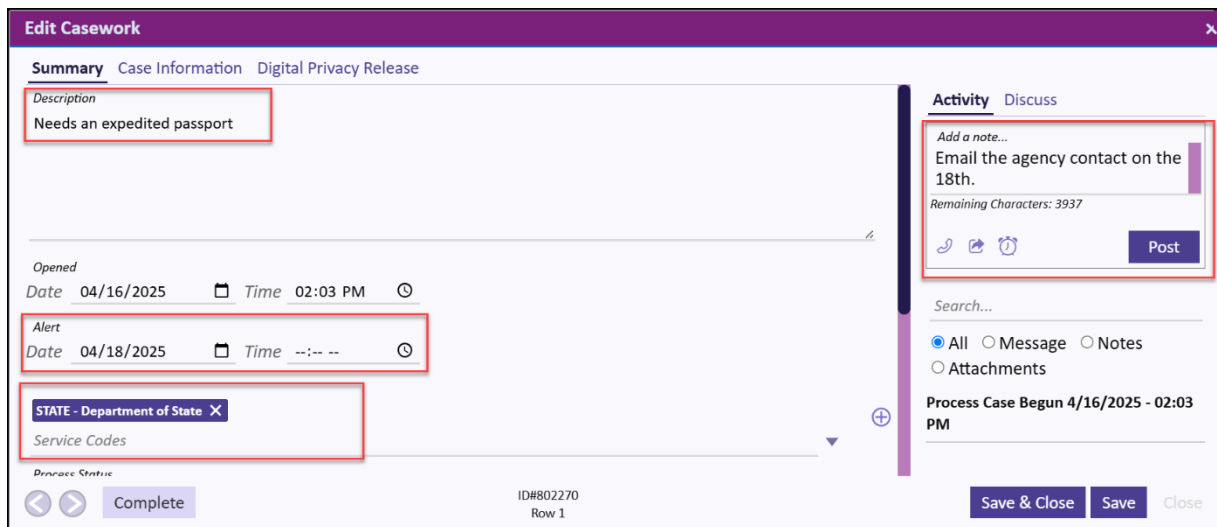
Create new Service with this Contact as Primary Person [X]

Please select an option

- ☐ Add to New Casework
- ☐ Add to New Flag Request (Web - Pay.gov)
- ☐ Add to New Meetings
- ☐ Add to New Tour Request
- ☐ Add to New Scheduling Requests
- ☐ Add to New Military Academy Nominations
- ☐ Add to New Projects & Grants
- ☒ Add to New Any Template

Continue Cancel


5. In the **Summary** tab, enter in the details in the **Description** field for the Casework (or other service).
6. 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.
 - b. If you would like to document what should happen when the alert is triggered, enter the notes in the Activity stream to the right. Type in the note and click **Post**.
7. Type in a **Service Code** to indicate which Federal Agencies (if any) are going to be involved in this Service.
 - c. **Note:** For a **Casework** service, you must have **at least one** service code in this field in order to complete the service. For other Services, such as a **Flag Request** there may be a unique service code that appears for you.



8. Continue to complete the information in the different tabs of the case: **Summary**, **Case Information**, and **Digital Privacy Release**. Note that tabs displayed can be unique to each office. Fill out the fields as you obtain 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.
9. Click **Save & Close** or **Save**.
 - d. **Save and Close:** Saves the information entered and returns you to the previous screen you were on.
 - e. **Save:** Saves the information entered without closing the window. This allows you to save your work as you go.

[Top of Page](#)

Attaching and Removing Contacts

1. If the Service was created from the Contact Record the **Primary Contact** field will have that Contact attached already.
 - a. **Note:** There can only be **one** Primary contact for each service.
2. To attach anyone else to the Case, click the  icon next to **Other Contacts**.
3. Use the **Find** or **Find and Add** tabs to search for Contacts in your database or create a new contact to attach to the Service. Click on the **Agency Contacts** tab to search your database for any Contact records that are tagged with the same Service code associated with your selected Service. Once found, select the Contact and click the **Attach to Service** button.

Attach Other Contact

Find Find and Add Agency Contacts

Search Contacts

Attaching as Other Contact

Affiliations

Attach to Service

Cancel

Attach Other Contact

Find Find and Add Agency Contacts

Search Agency Contacts

Contact Search Results

Flinchbaugh, Carrie

ID: 7117929

Messages Open: 5 Closed: 72

Services Open: 11 Closed: 62

Hillman, Ian

ID: 7117926

Messages Open: 0 Closed: 0

Services Open: 0 Closed: 0

Kaldahl, Ryan

ID: 7117928

Messages Open: 0 Closed: 0

Services Open: 0 Closed: 1

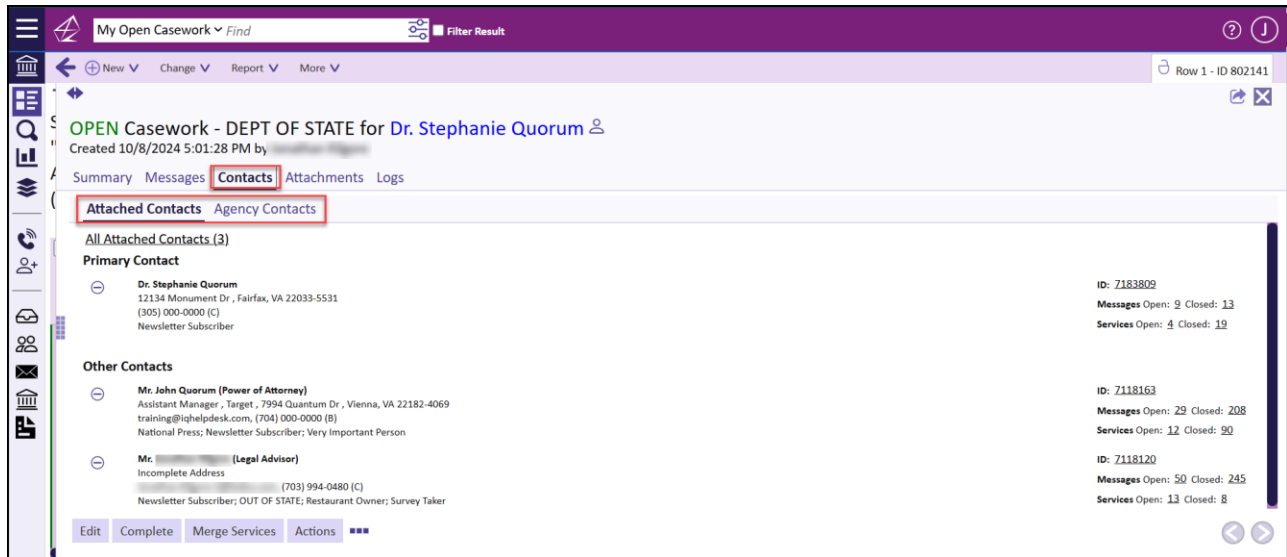
Cancel

- To review all attached Contacts, as well as attach additional Agency Contacts, click on the **Contacts** tab.

Page 7 of 24



Leidos proprietary 2025

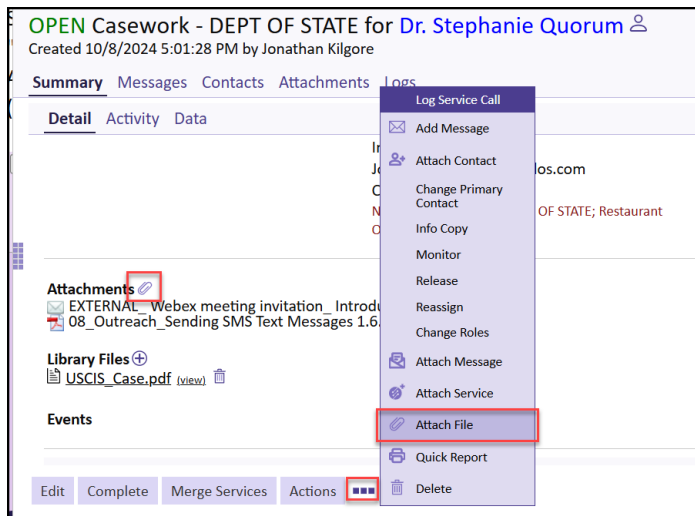
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.



[Top of Page](#)

Adding Attachments

1. Click either the  next to the **Actions** button, or click the  next to **Attachments**, and select **Attach File**.



2. In the Add Attachment window, enter the Note Text, if desired, and either:
 - a. Select a file to attach; or
 - b. Drag and drop the file into the text box.
3. Click **Save**.

Add New Service Attachment

Add Attachment

Note Text

Add a note to describe the attachment.

Attachment

Select File(s)

1 file(s) added.

A Sample Attachment.docx

Save

Close

4. Review your attached documents in the **Summary** or **Activity** sections or download them in the **Attachments Tab** at the top of the service.

OPEN Casework - DEPT OF STATE for Dr. Stephanie Quorum

Created 10/8/2024 5:01:28 PM by

Summary Messages Contacts Attachments Logs

Detail Activity Data

Incomplete Address

C: (703) 994-0480

Newsletter Subscriber; OUT OF STATE; Restaurant Owner; Survey Taker

Attachments

EXTERNAL_ Webex meeting invitation_ Introduction to IQ5.msg

08_Outreach_Sending SMS Text Messages 1.6.pdf

Activity Send Email Discuss

Post

Search...

All Message Notes Attachments

Uploaded File Attachment - 08_Outreach_Sending SMS Text Messages 1.6.pdf uploaded without a note

08_Outreach_Sending SMS Text Messages 1.6.pdf

Attachment

EXTERNAL_ Webex meeting invitation_ Introductio...

Download Open in New Tab

CAUTION: This email originated from outside of Leidos. Be cautious when clicking or opening content.

webex

has invited you

to a Webex meeting that

requires registration.

OPEN Casework - DEPT OF STATE for Dr. Stephanie Quorum

Created 10/8/2024 5:01:28 PM by

Summary Messages Contacts Attachments Logs

08_Outreach_Sending SMS Text Messages 1.6.pdf (8251k)

EXTERNAL_ Webex meeting invitation_ Introduction to IQ5.msg (501k)


[Top of Page](#)

Adding Notes

1. Within the Open Service, click on the field directly under **Activity** and type in your **Note**, then click **Post**. ***Note:** Each note has a 4000-character limit.
2. Notes can also be Pinned, Edited, or Deleted.

The screenshot shows a window titled "Activity" with tabs for "Activity", "Send Email", and "Discuss". The "Activity" tab is active. Below the tabs is a text input field with the placeholder "Add a note...". Below the input field are three icons: a phone, a share icon, and a clock. To the right of the input field is a blue "Post" button. Below the input field is a search bar with the placeholder "Search...". Below the search bar are four radio buttons: "All" (selected), "Message", "Notes", and "Attachments".

Logging Phone Calls


1. Click the  button underneath the Note text area.
2. Type in the name of the **Contact** that you are calling/have received a call from.
3. Select the **Call Type**, either **Incoming** or **Outgoing**.
4. Type the details of the call in the **Note** section.
5. Click **Attach**.

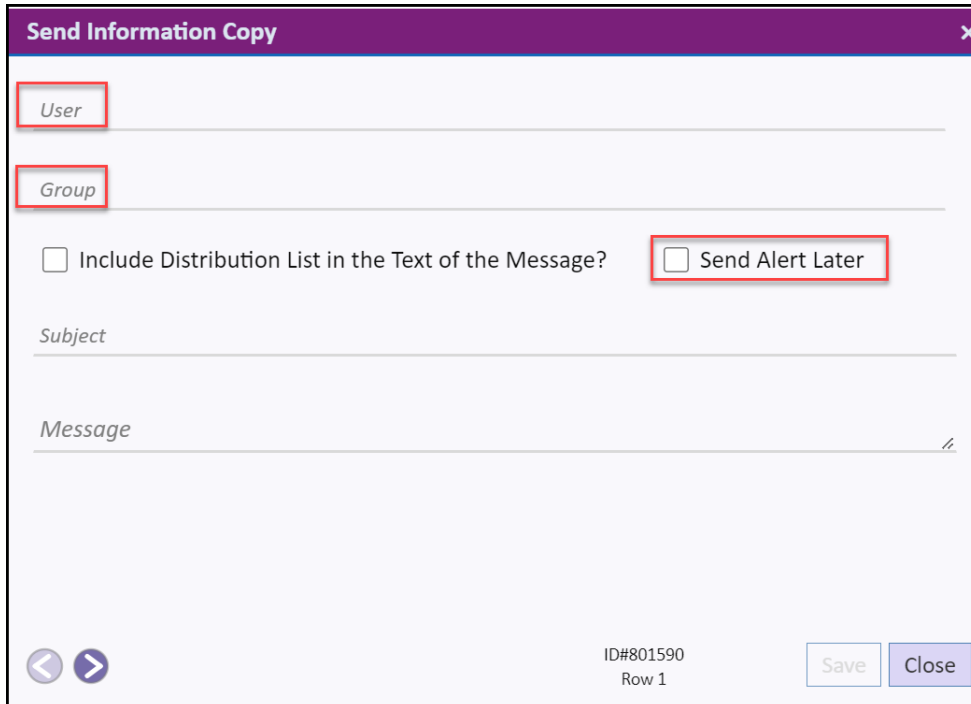
The screenshot shows a window titled "Log Call" with a close button (X) in the top right corner. The window contains the following fields and controls:

- Contact:** A text field containing "JANE QUORUM (ID:7183391)".
- Call Type:** Two radio buttons, "Incoming" (selected) and "Outgoing".
- Note:** A text field containing "Type details of call here|".
- Bottom Bar:** Contains two navigation arrows (left and right), the text "ID#801590 Row 1", and two buttons: "Attach" and "Close".

[Top of Page](#)

Creating Custom Alerts/Sending an Information Copy

1. Click the  icon underneath the Note text area.
2. 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 Alert will send.
- b. In the **Subject** field, enter the name of the Alert. For Example, "Call Primary Contact today".
- c. In the **Message** field, enter 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 **Save**.

Send Information Copy

User

Group

☐ Include Distribution List in the Text of the Message?
 ☒ Send Alert Later

Send On

Date mm/dd/yyyy

Time --:--

Subject

Message

<

>

ID#801590
Row 1

Save

Close

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

Send Information Copy

User

Group

☐ Include Distribution List in the Text of the Message?
 ☐ Send Alert Later

Subject


Message

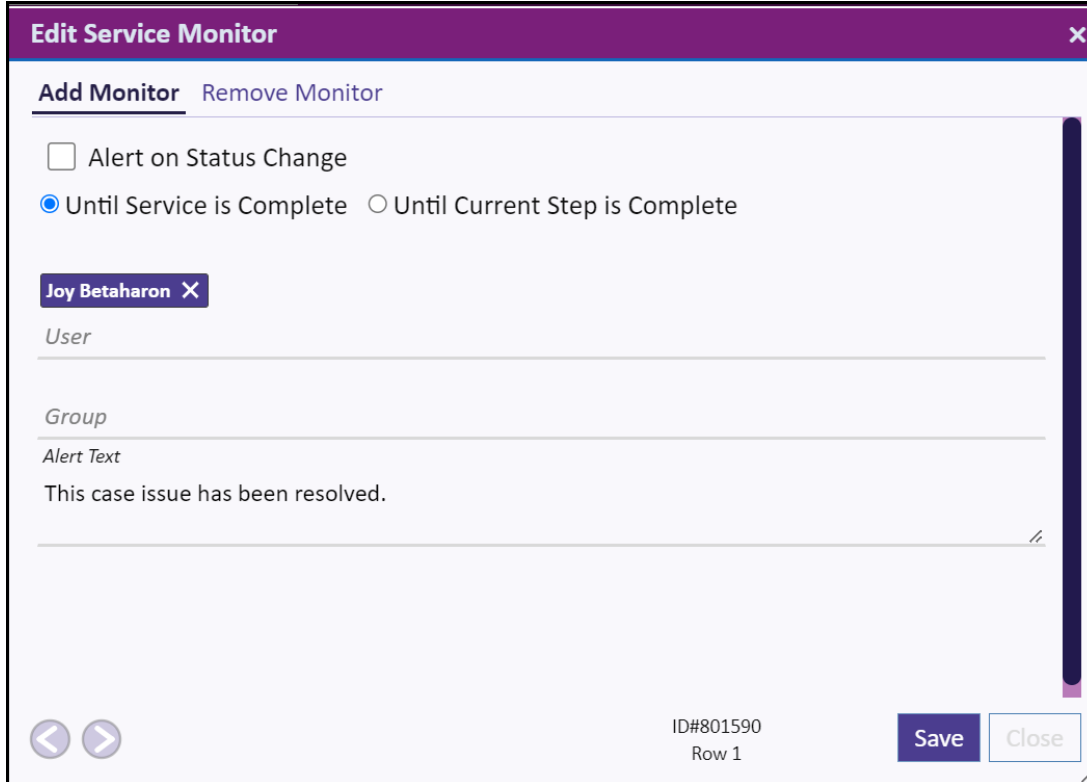
Save

Close

[Top of Page](#)

Add/Remove a Monitor

1. Click the  icon underneath the Note text area.
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. In the **Alert Text** field, enter what the Alert should say when sent to the Monitor(s).
6. Click **Save**.



Edit Service Monitor [X]

Add Monitor Remove Monitor

☐ Alert on Status Change

☒ Until Service is Complete ☐ Until Current Step is Complete

Joy Betaharon [X]


User

Group

Alert Text

This case issue has been resolved.

[<] [>] ID#801590 Row 1 [Save] [Close]

7. If **Removing a Monitor** click the **Remove Monitor** tab.
8. Click the  next to the User(s) or Group(s) you wish to remove as a monitor.
9. Click **Save**, if necessary. The window will automatically close if there is only one monitor.

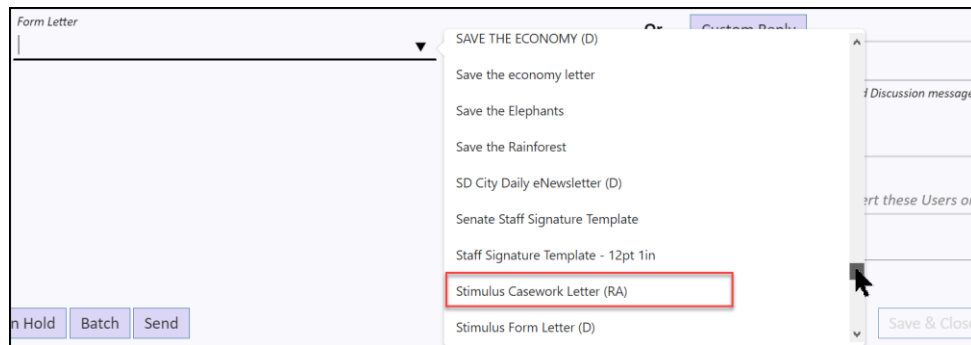
| Scope | User | Group | Alert | Alert Text |
|---------|---------------|-------|-------|------------------------------------|
| SERVICE | Joy Betaharon | | No | This case issue has been resolved. |

[Top of Page](#)

Sending a Message

1. Open an active service record.
2. Select the envelope icon next to the Primary or Other Contacts.

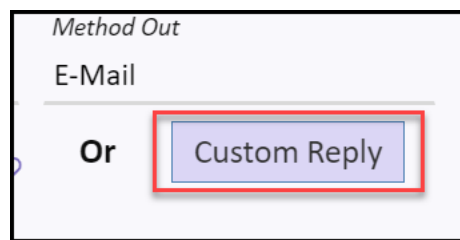
3. Select the option to respond to the constituent.
 - a. **Option - Form Letter**
 - i. Complete all necessary fields.
 - ii. At the Form Letter field, click into the field and select a Form Letter from the dropdown list.




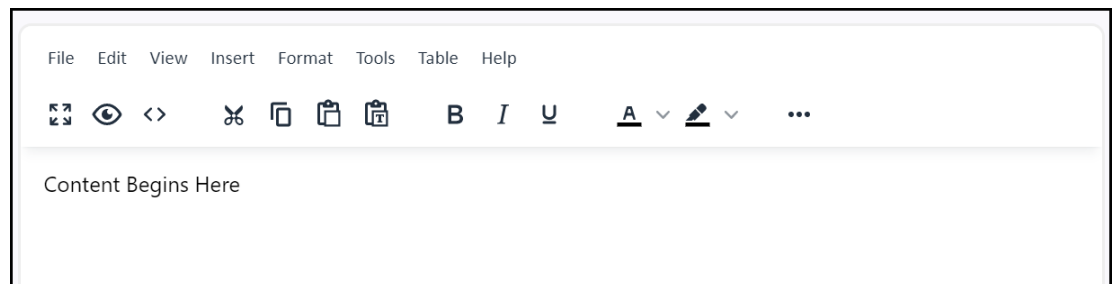
- iii. Select **Send**. (If you customize a form letter, you may need approval to send the form letter. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

b. **Option - Custom Reply**

- i. Click the **Custom Reply** button.




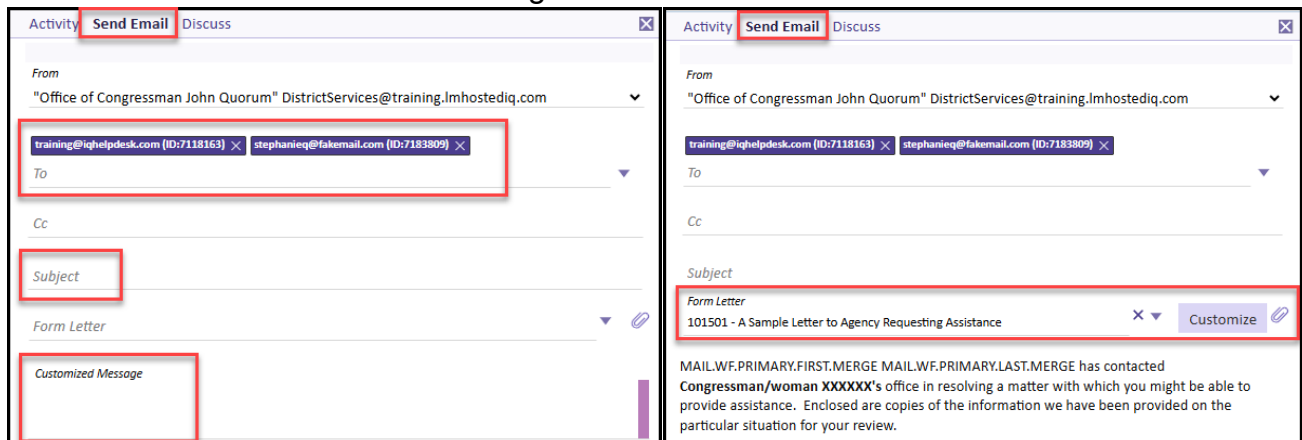
- ii. Use the content editor to type the custom reply. (To utilize the full screen option for the editor, click the ).



- iii. Select **Send**. (You may need approval for the custom reply. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

Sending a Quick Email

1. Click on **Send Email** next to **Activity** on the right-hand side of your Service.
2. Click in the **To** field to select the recipient. Multiple emails can be chosen.
3. Write a subject line and then choose a **Form Letter** or write a **Custom Message** in the space below.
 - a. If a Form Letter is selected, you can click **customize** to edit the letter text as needed.
 - b. **Detail, Activity, and Data** tabs can be accessed on the left as you are typing your email.
4. Click on the  icon to add an attachment.
5. Choose **More Message Options** to see the full Message Sending screen.
6. Click **Send Email** to send the Message.



The image displays two side-by-side screenshots of the 'Send Email' interface. Both screenshots show a top navigation bar with 'Activity', 'Send Email', and 'Discuss' tabs. The 'Send Email' tab is active in both.

The left screenshot shows the 'To' field with two email addresses selected: 'training@iqhelpdesk.com (ID:7118163)' and 'stephanieq@fakemail.com (ID:7183809)'. The 'Subject' field is empty. Below the 'Subject' field, there are two options: 'Form Letter' and 'Customized Message'. The 'Form Letter' option is selected, and a small attachment icon is visible to its right.

The right screenshot shows the 'Form Letter' option selected with a subject line '101501 - A Sample Letter to Agency Requesting Assistance'. A 'Customize' button is visible to the right of the subject line. Below the subject line, the text of the form letter is displayed: 'MAIL.WF.PRIMARY.FIRST.MERGE MAIL.WF.PRIMARY.LAST.MERGE has contacted Congressman/woman XXXXXX's office in resolving a matter with which you might be able to provide assistance. Enclosed are copies of the information we have been provided on the particular situation for your review.'

[Top of Page](#)

Closing the Case

1. Find the active service record assigned to you.
2. Select **Complete**.
3. If additional information is needed before the Service can be closed you will be prevented from closing the Service and must click **Change Data** to add the missing information.

OPEN Casework - DEPT OF STATE for **Dr. Stephanie Quorum** 

Created 10/8/2024 5:01:28 PM by 

Summary Messages Contacts Attachments Logs

Detail Activity Data

Assigned:  **Release**

Updated: 4/16/2025 12:53 PM **Alert:** 11/08/2024 12:00 AM 

Description: 

Needs passport expedited

Codes: 

STATE--Department of State

Primary Contact

Dr. Stephanie Quorum  


12134 Monument Dr
Fairfax, VA 22033-5531
C: (305) 000-0000

Other Contacts 

Mr. John Quorum (Power of Attorney)  

Assistant Manager
Target
7994 Quantum Dr

Edit **Complete** Merge Services Actions 

Complete Service 

Route Service 801627 from Process Case



Available Routes
☒ Completed **Denied**

Selected Route Information...


Route to Completion
Denied because of missing required fields: Resolution

Open Message Resolution...

☒ Leave Open ☐ Complete ☐ Complete with No Response

  **Change Data** ID#801627 Row 1 **Complete Step** **Cancel**

4. Complete the information in the **Complete Service** window. Click **Save**.


Complete Service 


Route Service 801613 from Process Case



Available Routes
☒ Completed

Selected Route Information...

Route to Completion
☐ Send Info Copies

Closing Note... 

Closed Status Code... 



  ID#801613 Row 5 **Save** **Close**

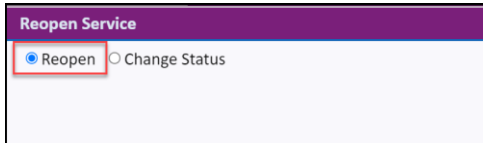
[Top of page](#)

Finding and Reopening a Closed Service

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










1. Search for your closed service record.


2. Select either  in the detail record in the bottom left corner, or  next to the service name in the list view of your services.
3. Select **Reopen**.
4. In the Reopen Service window, select **Reopen** → **Save**.



[Top of Page](#)

Managing Cases from the List View

1. Navigate to your Open Cases by clicking on the .
2. You should now be viewing **My Open Casework**. If you want to change the list of records you're viewing, click on the  Views icon next to the **Filter List**. This will open up your **Views** which have replaced the menu options from the IQ4 Big Menu (i.e. **My Open Casework**, **All Open Casework**, **Recently Closed Casework**, etc.)
3. When viewing your list of Cases, use the **Filters** on the left just as you did in IQ4 to find Cases based off **Service Code**, **Assigned User**, etc.
4. Use the **In Row Action Icons** to take quick actions with your Cases. Each icon's action is defined below:
 - a.  **Edit**: Edit the **Details** of your Case.
 - b.  **Add Message**: Create and send a **Message** to the Primary or one of the Other, Contacts within the Case.
 - c.  **Attach Contact**: **Attach a Contact** to your Case.
 - d.  **Attach Message**: **Attach an Existing IQ Message** to the Case.
 - e.  **Attach Service**: **Attach an Existing IQ Service** to the Case or **Create a New Service** and Attach it.
 - f.  **Attach File**: Attach files from your computer to the Case.
 - g.  **Open Record in New Tab**: Open the Case in a new tab. ***Note**: Right clicking on a case will not prompt an option for opening in a new tab. You *must* click on this icon to open the Case in a new tab.

h.  **Set Personal Tag:** Set a **Personal Tag** on the Case. ***Note:** you need to create your Personal Tags first by clicking on a **Case → Change → Personal Tags → Add a New Tag**.

i.  : See **all available actions** you can take with the Case.

5. **Sort** your Cases in the top right just as you did in IQ4.

6. Use the **Main Menu Actions** to create New Cases, make Changes to multiple cases (such as reassigning and acquiring), create/run **Reports**, and **More**.



[Top of Page](#)

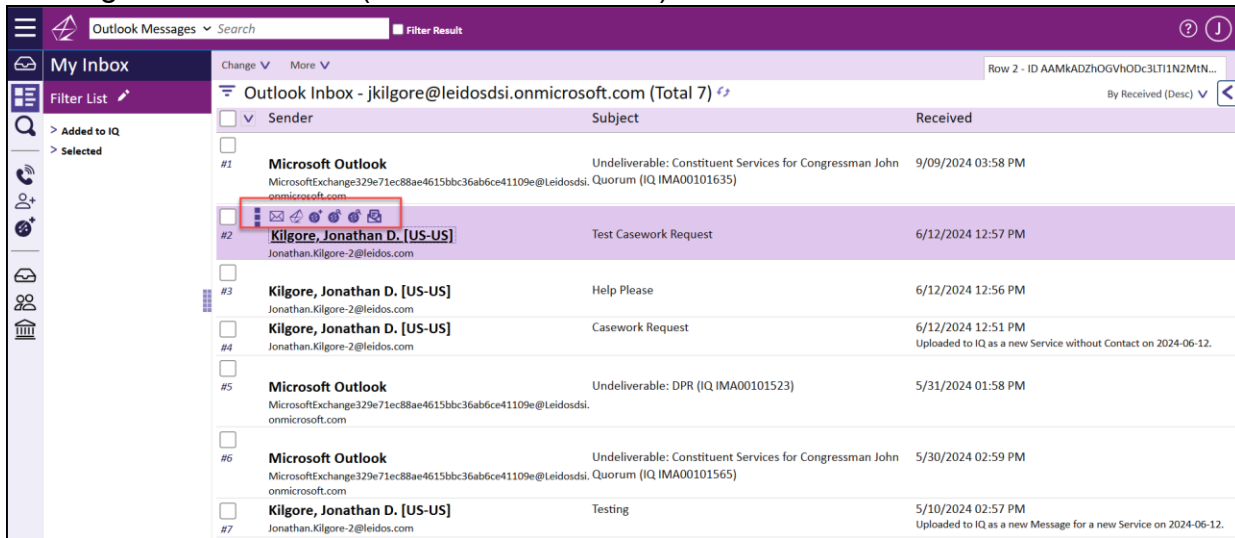
Utilizing Outlook in IQ5

If you used the Outlook Add In for IQ4, this will still function as usual. However, with IQ5, you can sync your Office 365 email with IQ. This allows you to access emails from your Outlook inbox in the My Inbox application, as well as send emails from within IQ using your 365-email account.

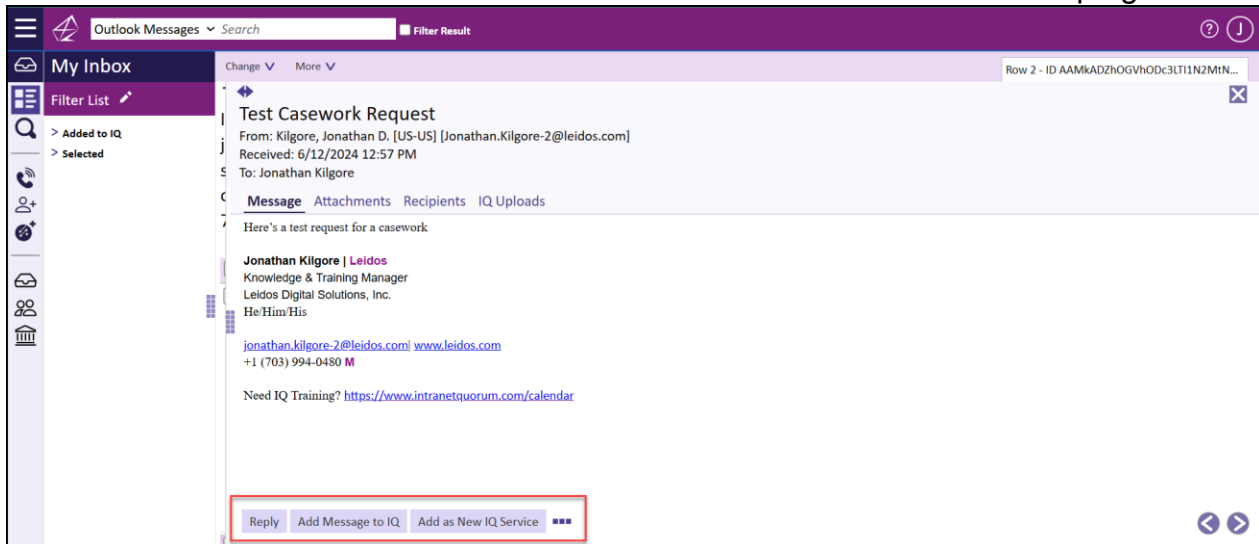
1. First connect your Office 365 account with IQ by going to User Settings → Outlook.
2. Type your O365 email and click **Get Access Token**.
3. Sign in on the following page. Once Signed in a new page will appear showing that you were successful.
4. Go back to IQ5 and navigate to the **My Inbox** application.
5. Add the new View for **Outlook Messages** by:

- a. Clicking on the  Views icon next to the **Filter List**.
- b. Click on the  icon next to **Views**.
- c. Check the box next to **Outlook Messages**.


6. You can now see all of your outlook emails, reply from IQ, or add them to IQ as a new Message and/or Service (such as a Casework).



7. Click the Email in the List to see it in more detail. Click the X button in the top right when done.




Replying to Outlook Emails in the My Inbox Application

1. Click on the Email you want to reply to and click **Reply** in the reading pane or through the  icon.
2. Match the email with an existing IQ Contact Record. If there is no match, click **Add Contact** to create a new record for the sender of the email.

3. Review the next screen to ensure the fields are correct and tag the message with an issue(s) code as needed. Click **Continue**.

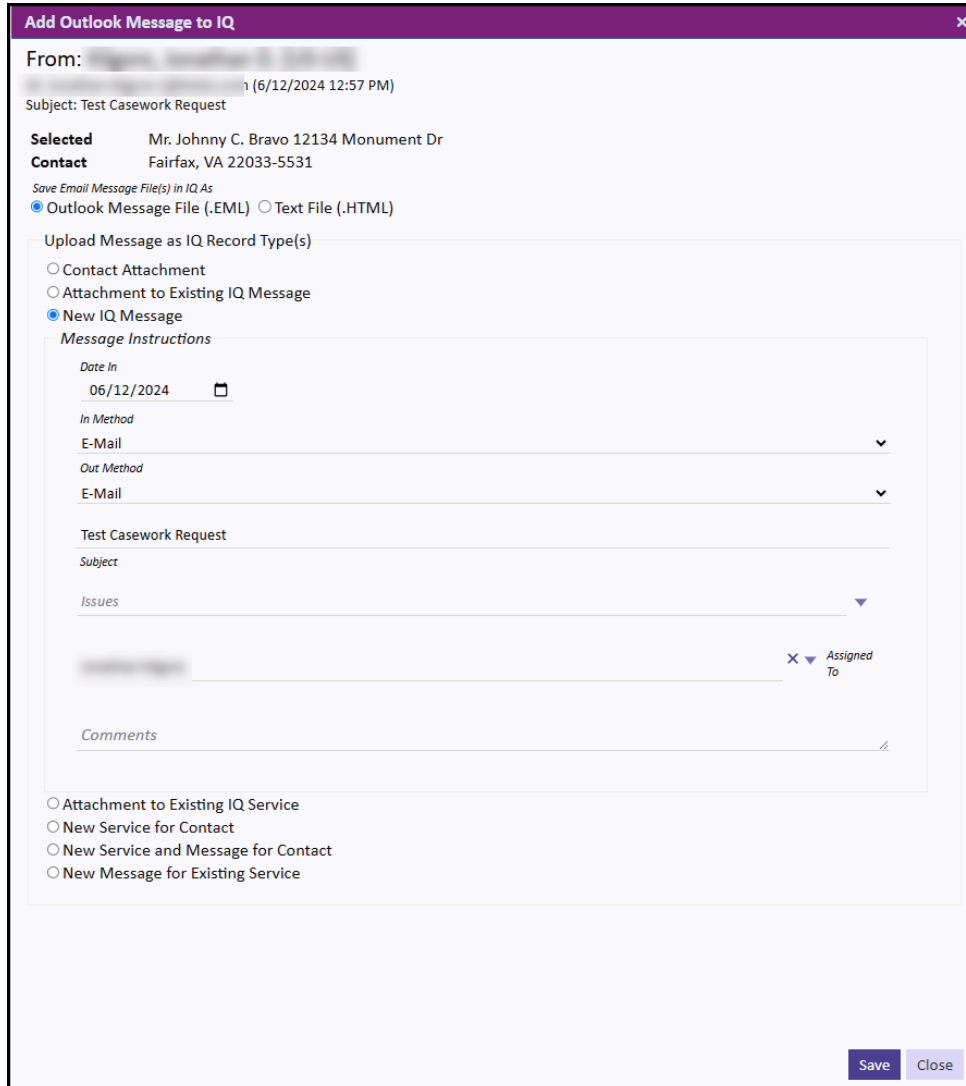
4. The email has now been added to IQ as a Message and the response window appears, allowing you to review the email and write a custom reply or select a Form Letter as appropriate.
5. Click **Send** when ready.

Adding Outlook Emails to a New or Existing Service

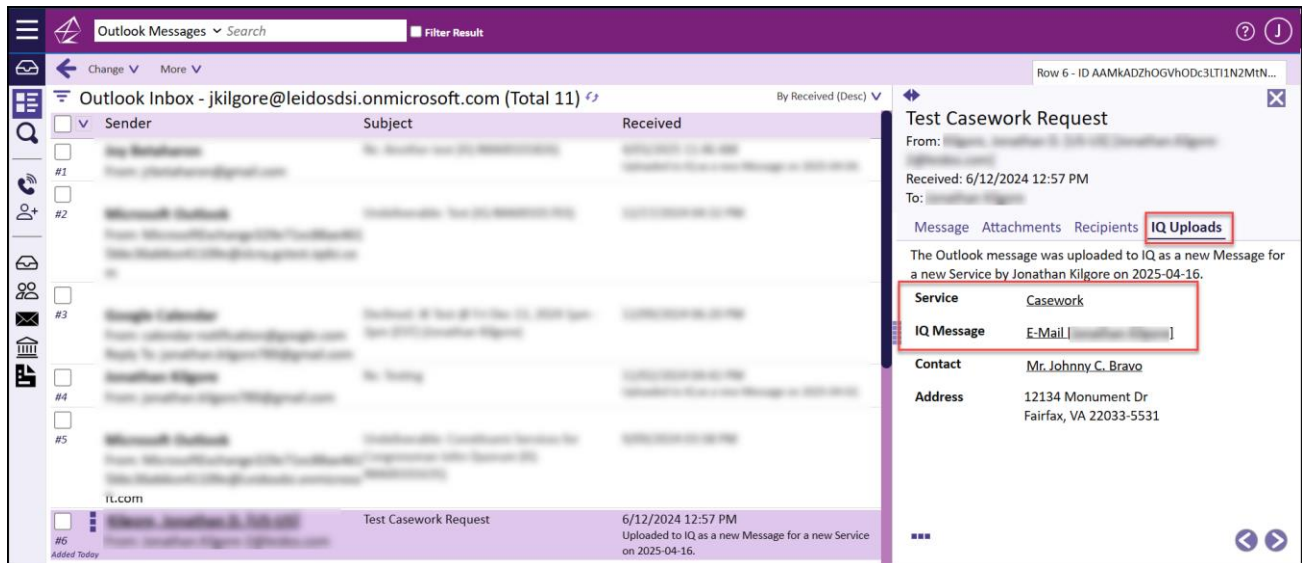
1. Click on the Email you want to create a new Service for/add to an existing service and click **Add Message to IQ** in the reading pane or through the  icon.
2. Match the email with an existing IQ Contact Record. If there is no match, click **Add Contact** to create a new record for the sender of the email.

3. Review the Selected Contact information and then choose what you would like to do from the following (hover over each option for a tooltip definition if needed):
 - a. **Contact Attachment:** Adds the email as an attachment to the Contact record.
 - b. **Attachment to Existing IQ Message:** Adds the email as an attachment (.EML file) to an existing IQ Message from a Constituent.
 - c. **New IQ Message:** Adds the email as a new open IQ Message to reply to.
 - d. **Attachment to Existing IQ Service:** Adds the message as a .EML file attachment for viewing/downloading within an existing Service.

- e. **New Service for Contact:** Use the message to create a new Service (such as Casework) for the Contact.
- f. **New Service and Message for Contact:** Creates a new Service (such as Casework) for the contact and adds the email as an Open Message to that new service (from which you could then reply to the email).
- g. **New Message for Existing Service:** Adds the email as a new Open Message for an Existing Service (such as casework).

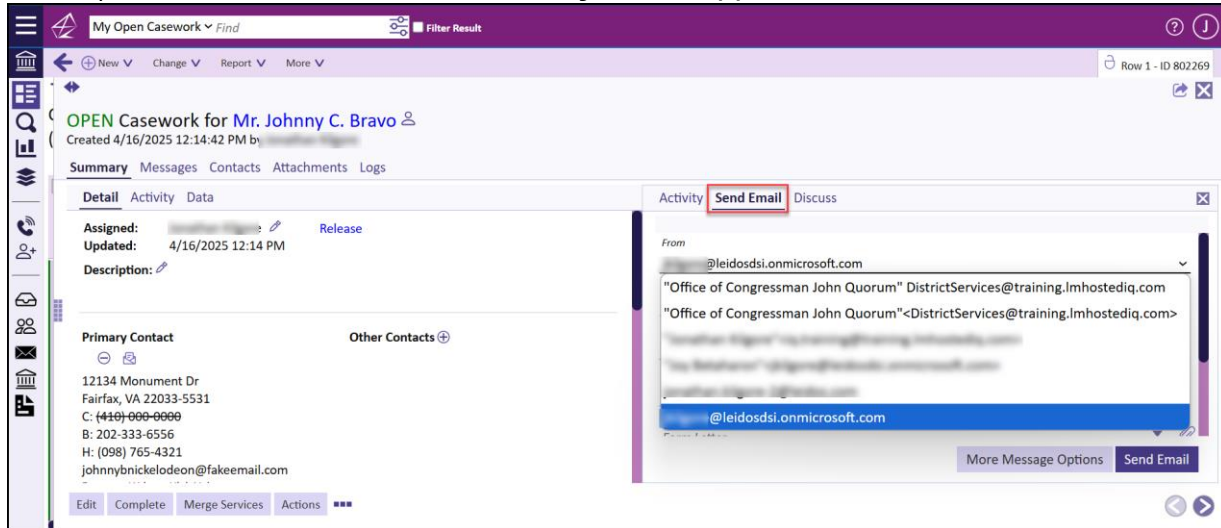


- 4. If you select any of options D-G above, IQ will prompt you to find the existing Service and/or choose what type of service to be created with this email.
- 5. Click **Save**. Your screen will be brought back to the My Inbox application. Click on **IQ Uploads** in the Reading pane to access the existing service or new service the message has been used for.



Sending from O365 email within a Service

1. Navigate to the Service of your choice and click on an Open record.
2. Click on **Send Email**.
3. Click into the **From** email address dropdown and select your Office 365 email.
4. Now IQ will send your email using that address and responses received will go into that email inbox (which can be viewed within the **My Inbox** application as noted earlier in this document).



[Top of Page](#)