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

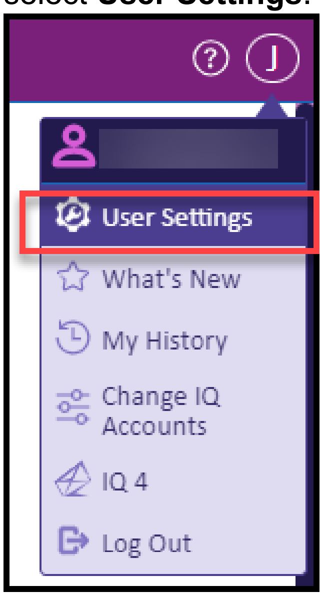
Utilizing Outlook in IQ5

Sending a Message

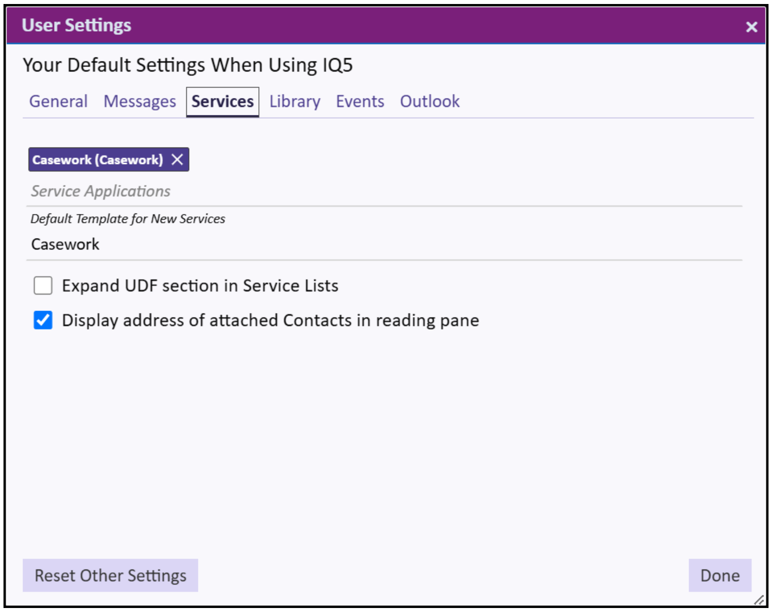
Sending a Quick Email

Setup

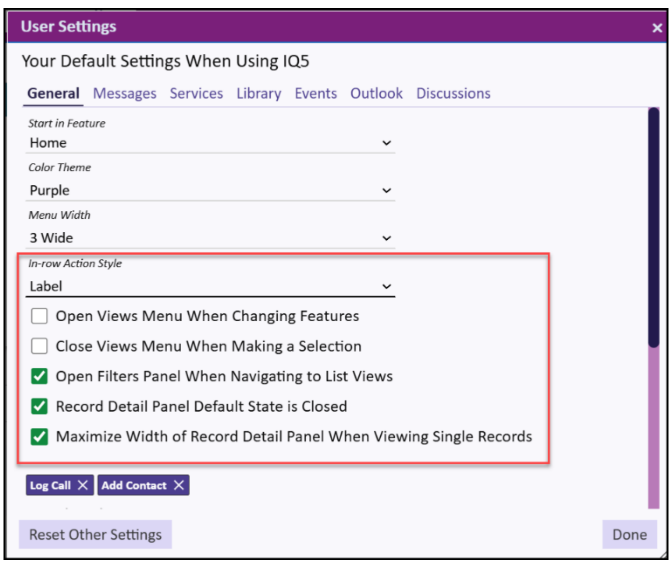
1. First, set up your User Settings. Click on your initial in the upper right-hand corner. Then, select **User Settings**.



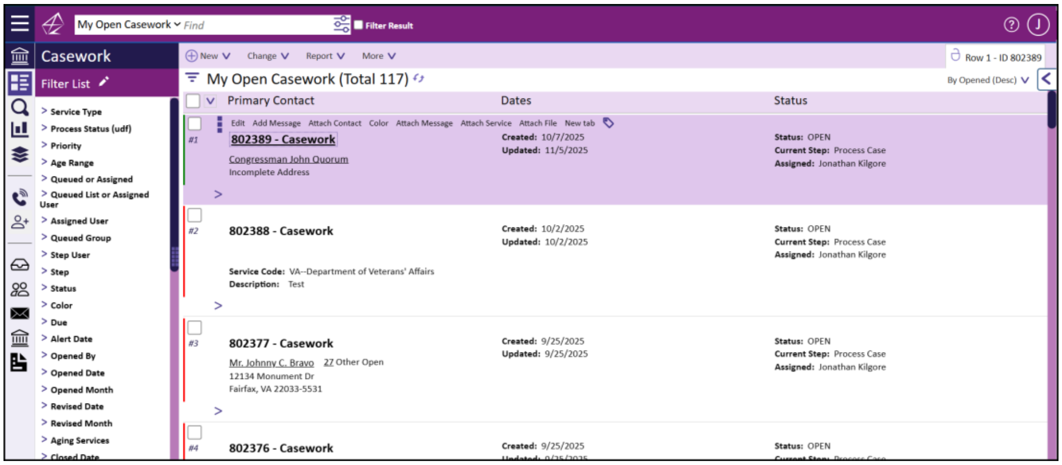
2. Click on the **Services** tab and make the following changes so your settings match the image below. **Note:** More Services than Casework can be added to the Service applications section. If there is a Service you wish to add that is not displayed, reach out to your IQ Consultant for assistance.



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



4. 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:

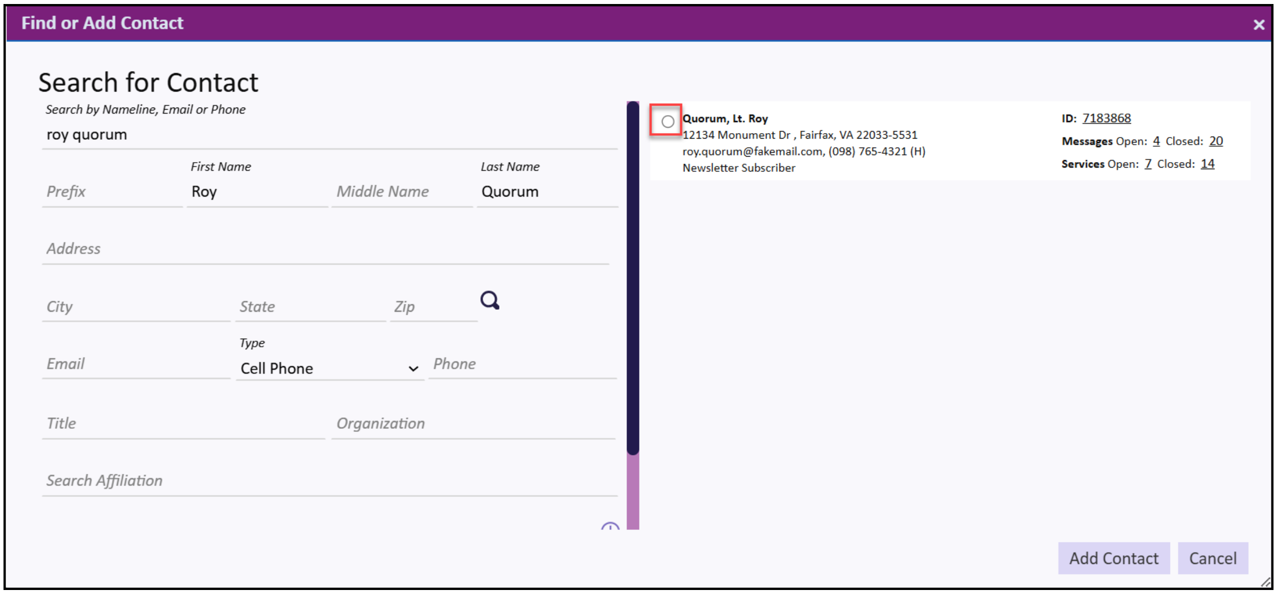


5. The same Homepage tiles you utilized in IQ4 are available in IQ5. Be sure to add any to your homepage that are not already there such as:
    a. My Work Summary
    b. Alerts
    c. My Open Services
    d. My due/alert Services
6. This completes your setup.

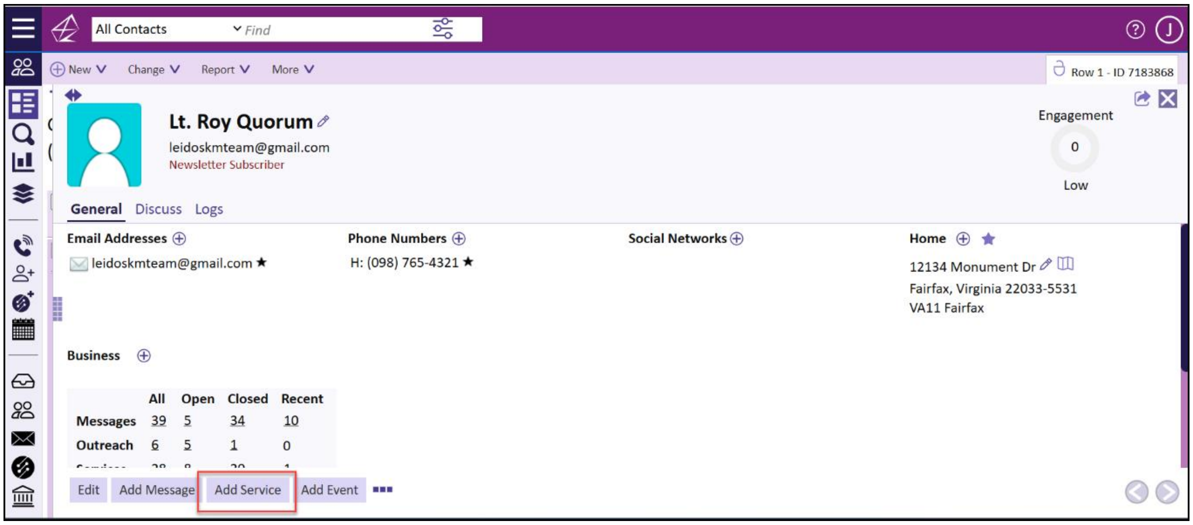
Casework Process:

Creating a Case

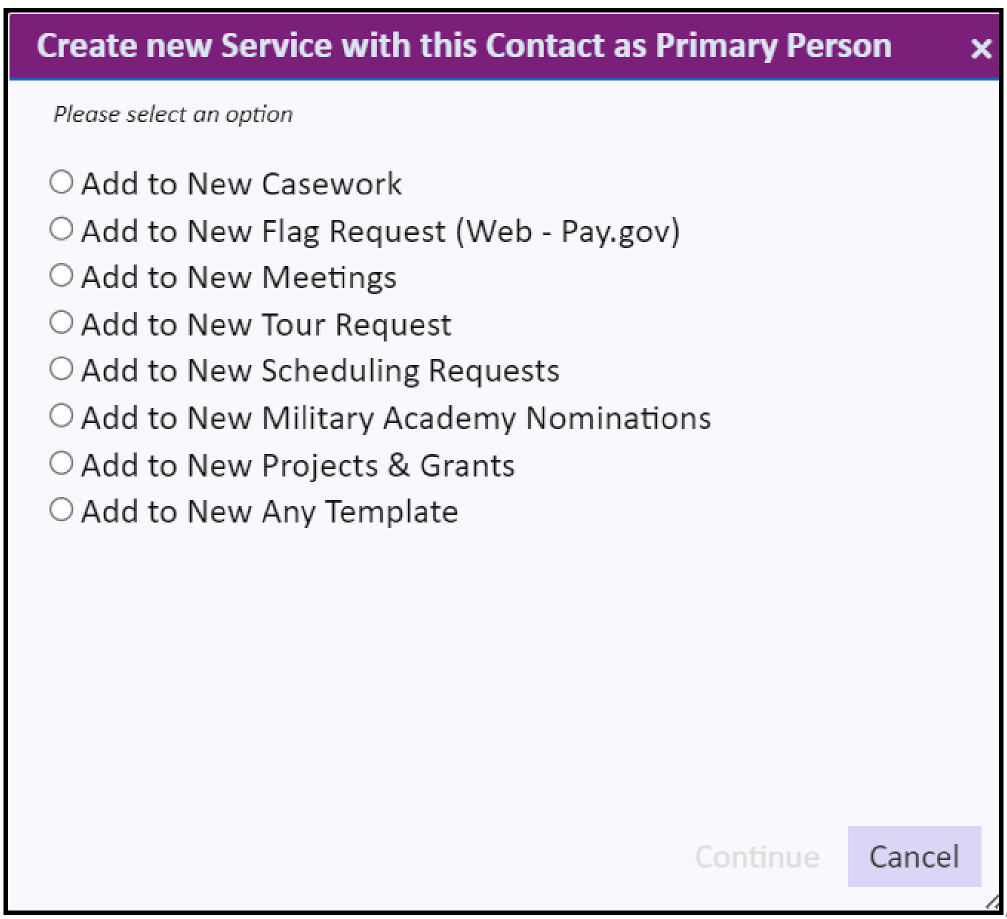
1. Search for a contact record using the **Find and Add a Contact** icon .
2. Click the radio button next to your existing Contact or, if the Contact does not exist, add in the rest of their information and click Add Contact.



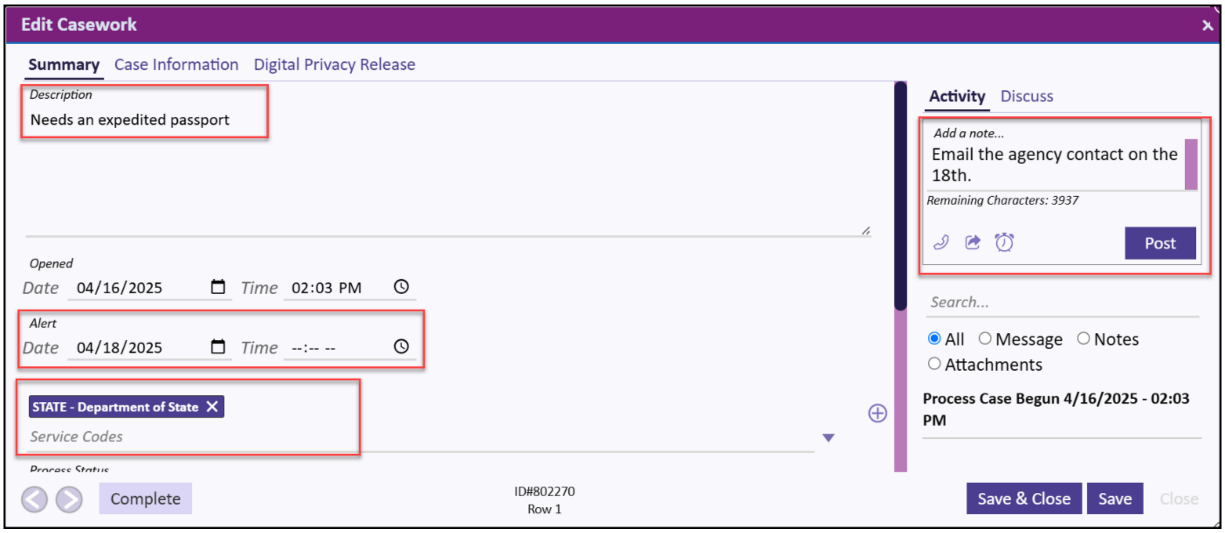
3. Click the **Add Service** button when viewing the Contact.



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.**



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.

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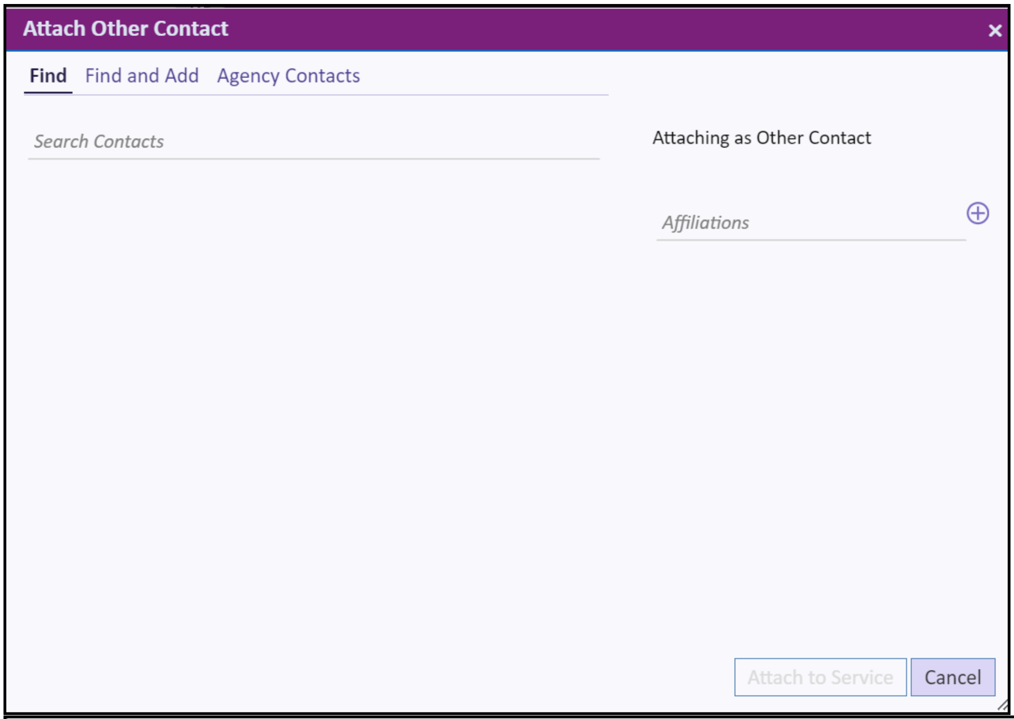
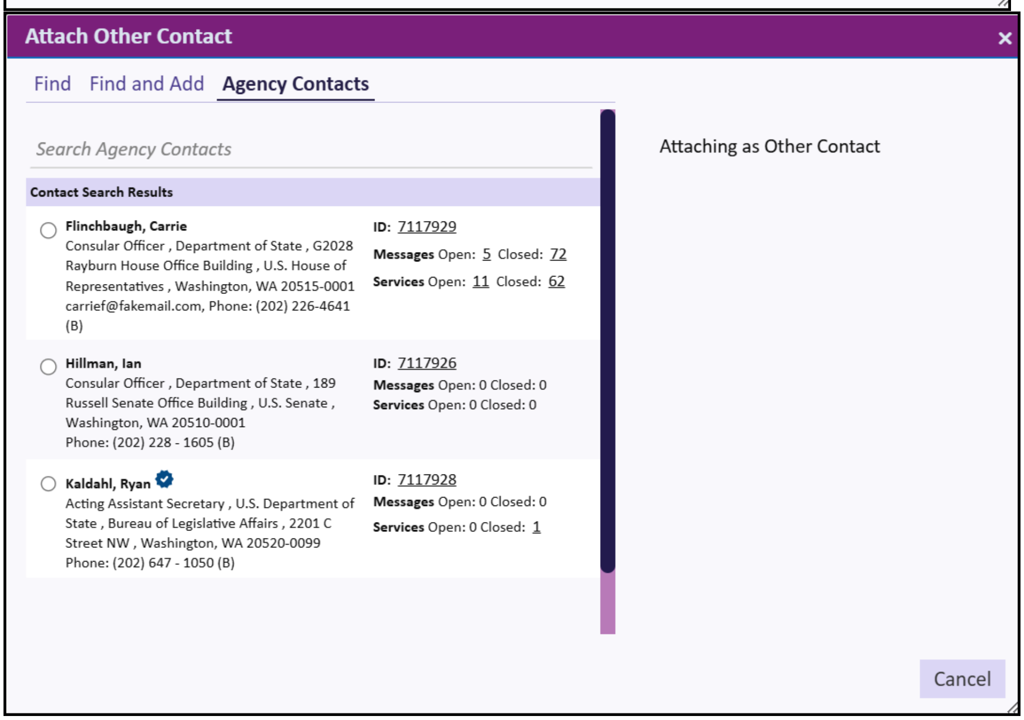
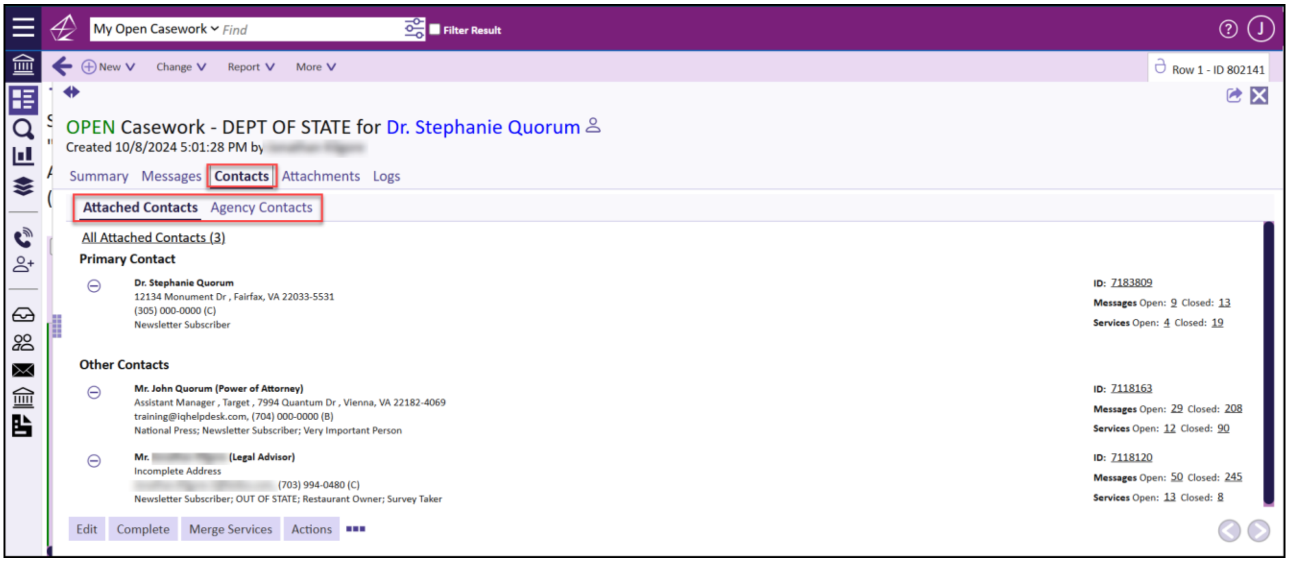
Attaching and Removing Contacts

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.





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



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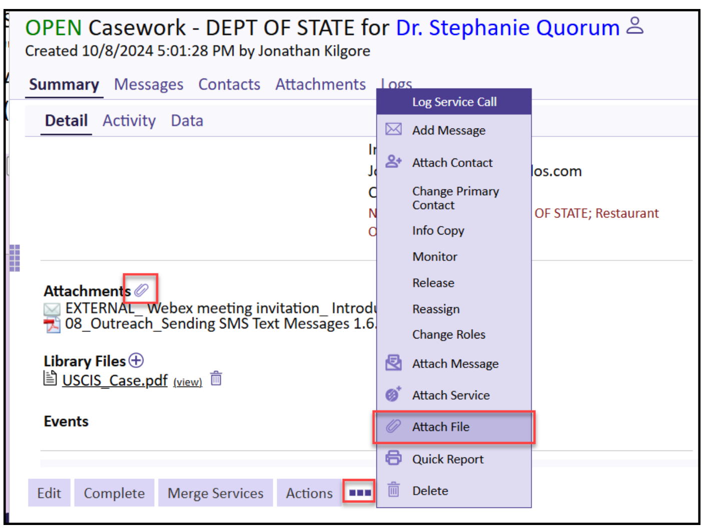
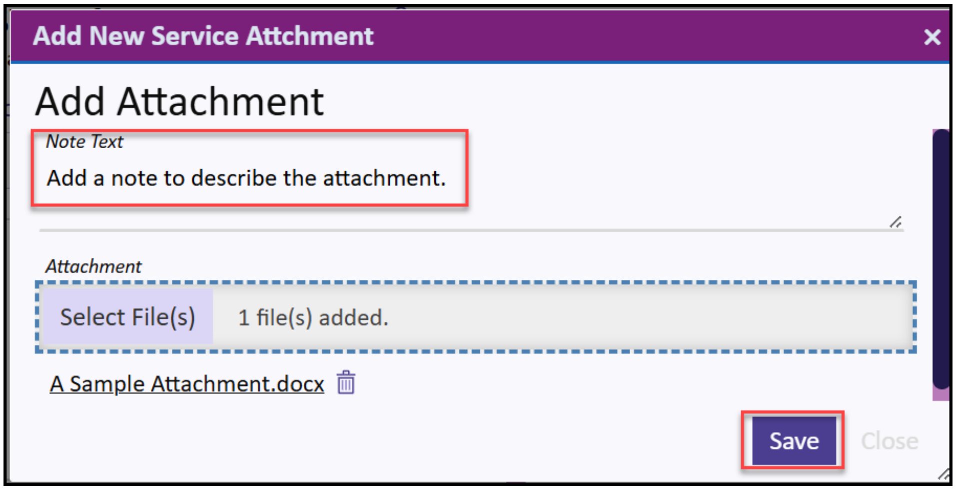
Adding Attachments

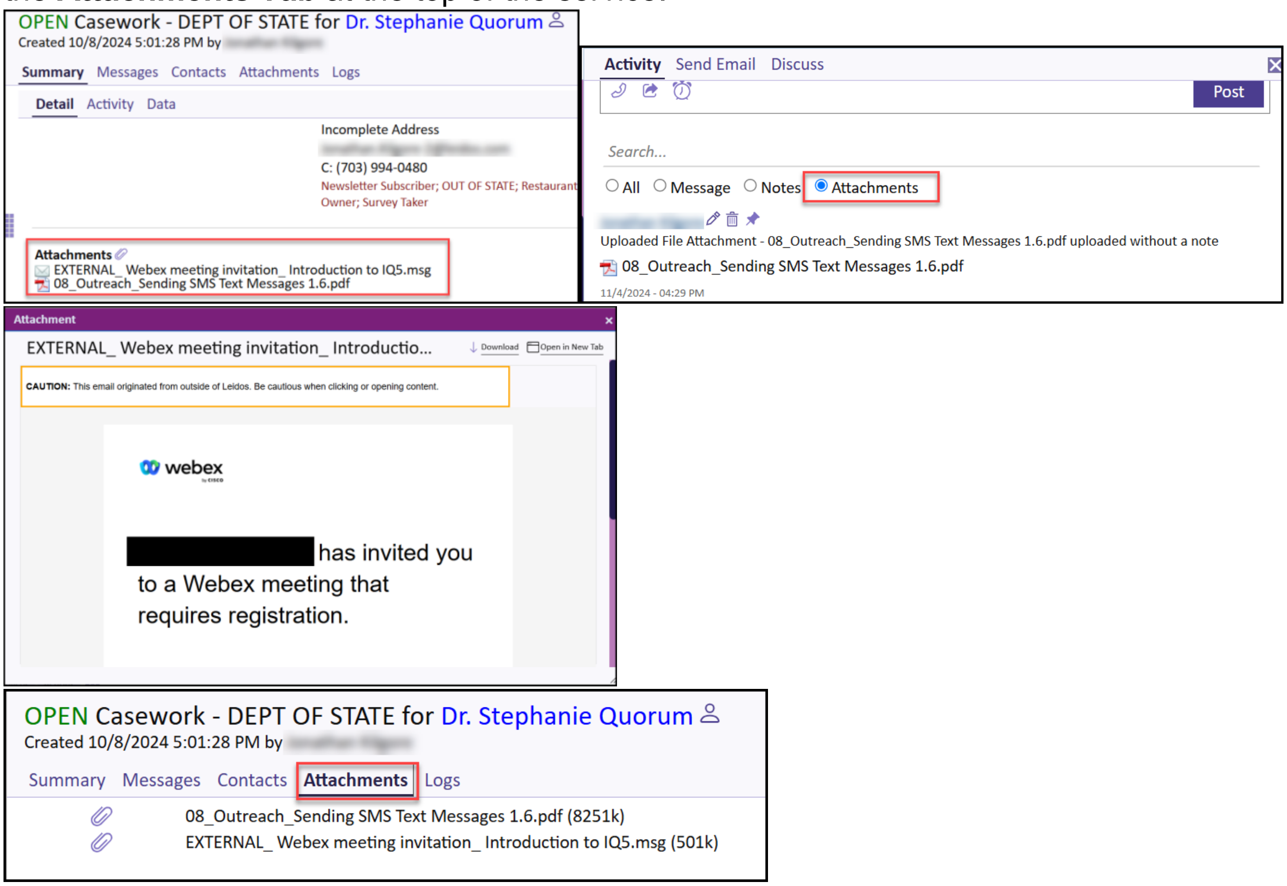
1. Click either the next to the **Actions** button, or click the next to **Attachments**, and select **Attach File**.



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**.



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



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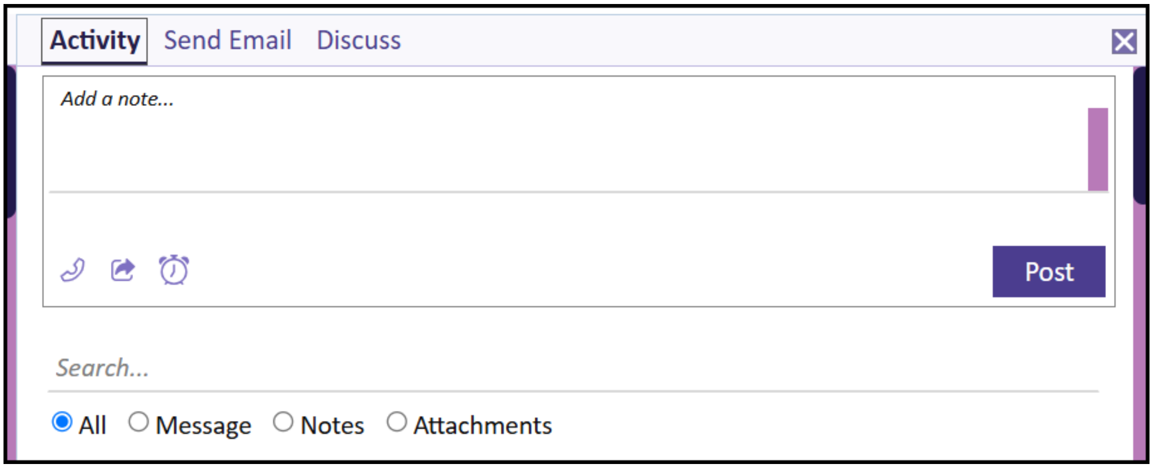
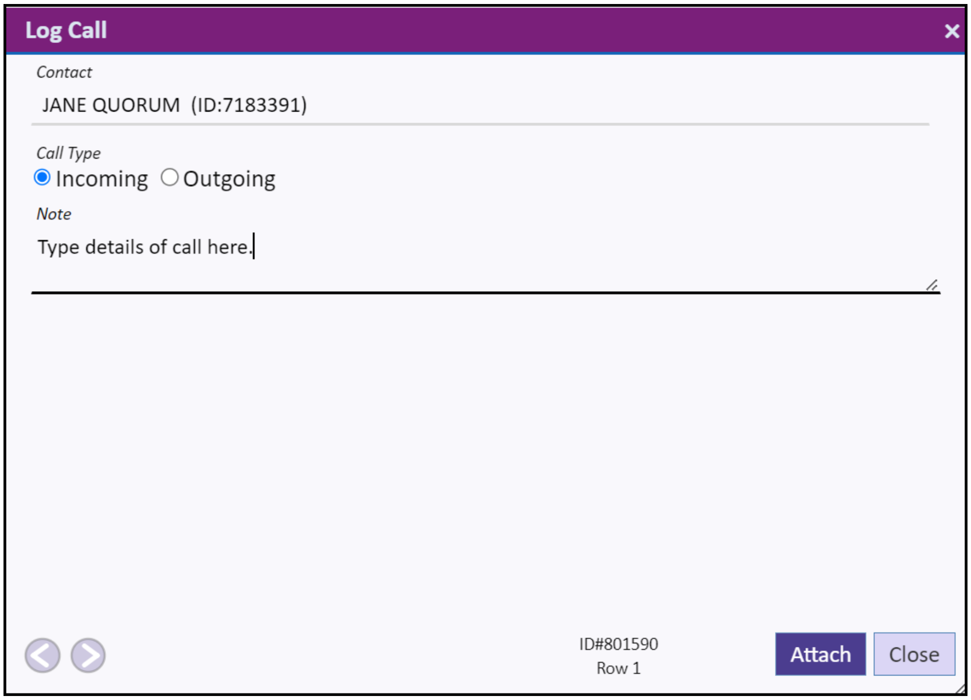
Adding Notes

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.



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**.



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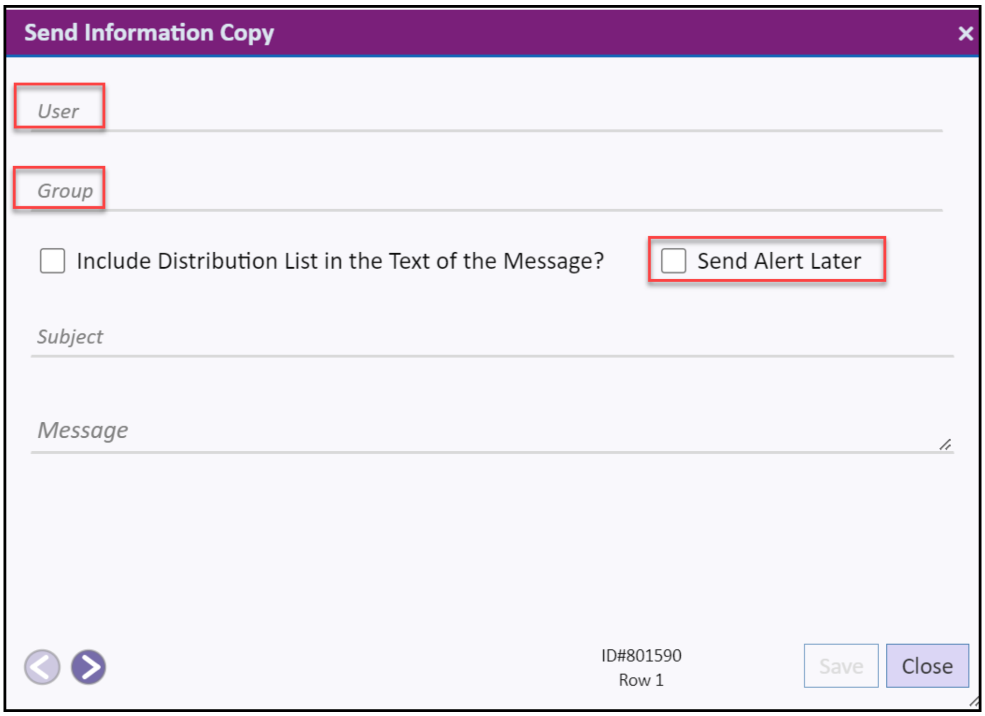
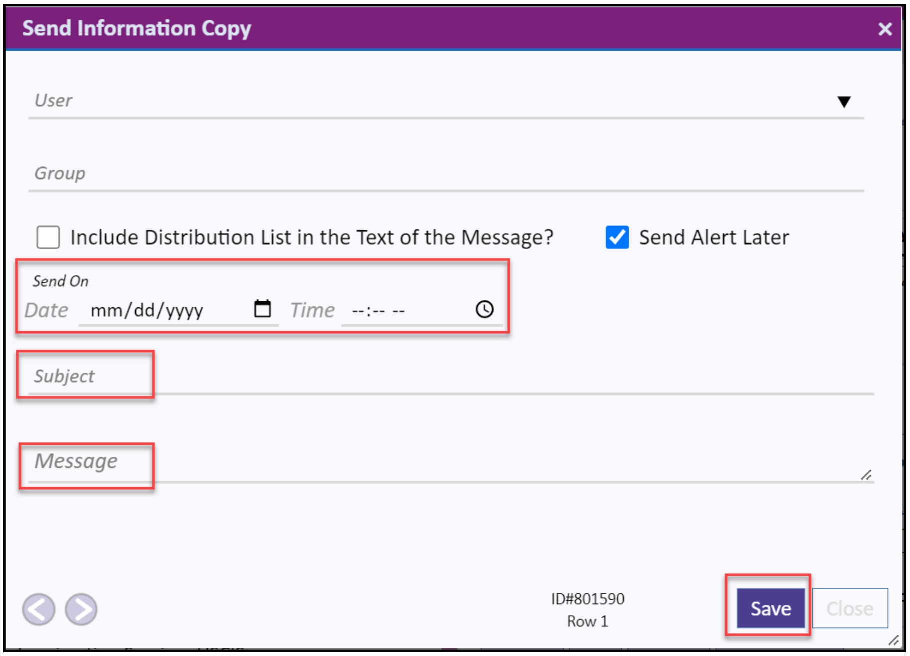
Creating Custom Alerts/Sending an Information Copy

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.



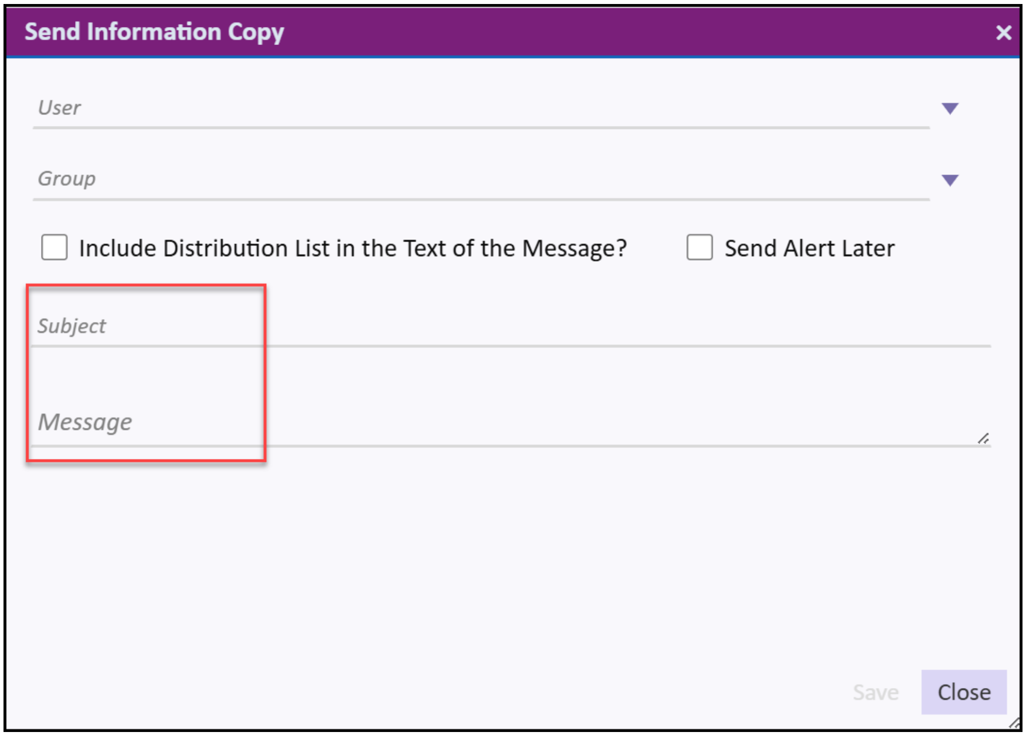
   a. The **Send On** fields now appear. Click into the **Date** and **Time** fields to choose when and at what time the Alert will send.
   b. In the **Subject** field, enter the name of the Alert. For Example, “Call Primary Contact today”.
   c. In the **Message** field, enter the details of the Alert.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



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**.



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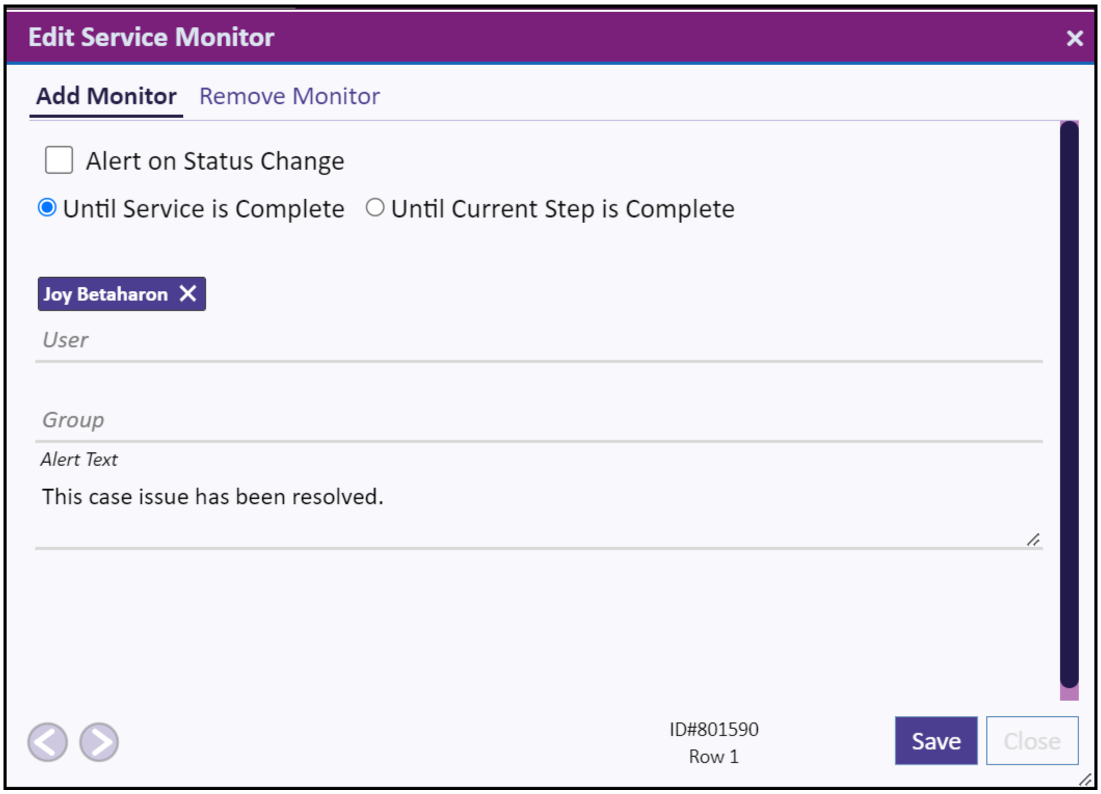
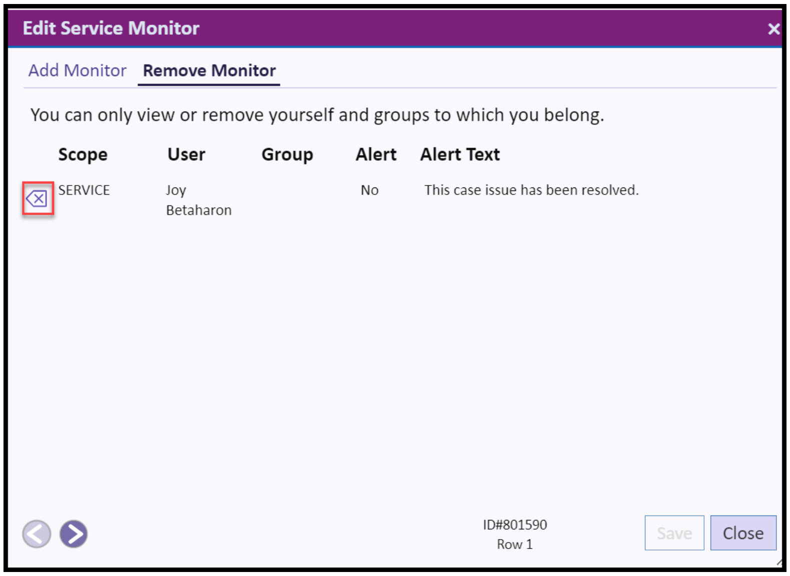
Add/Remove a Monitor

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**.



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.



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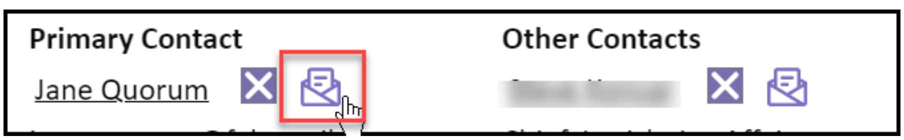
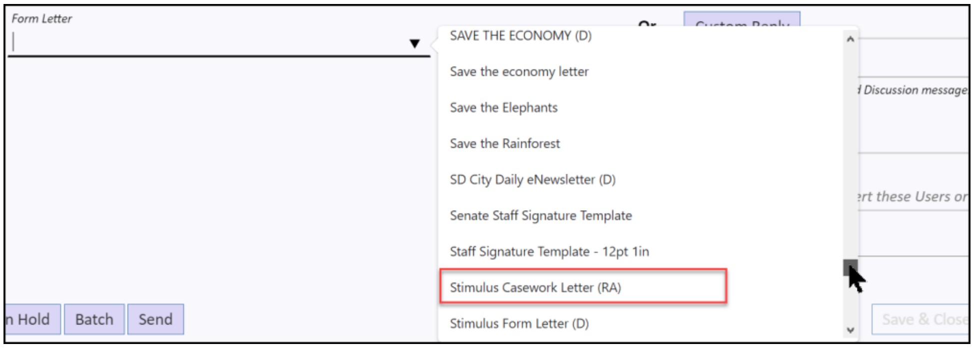
Sending a Message

1. Open an active service record.

2. Select the envelope icon next to the Primary or Other Contacts.



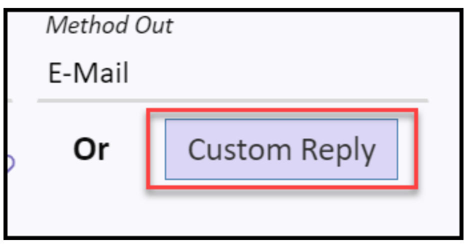
3. Select the option to respond to the constituent.
   a. **Option - Form Letter**
      i. Complete all necessary fields.
      ii. At the Form Letter field, click into the field and select a Form Letter from the dropdown list.

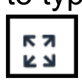


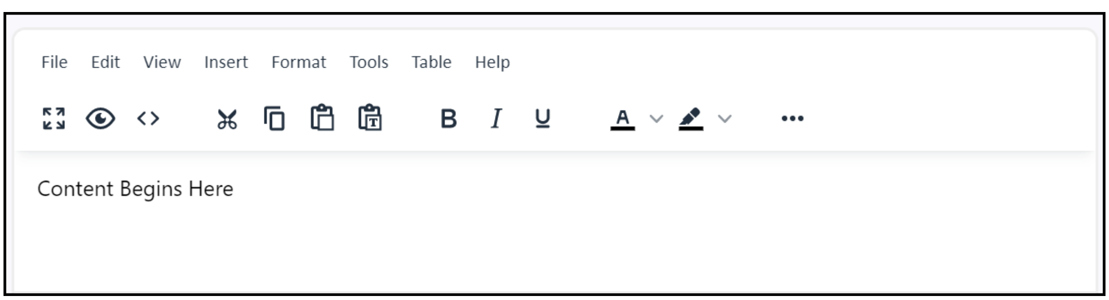
iii. Select **Send.** **(**If you customize a form letter, you may need approval to send the form letter. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of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

b. **Option - Custom Reply**

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

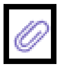


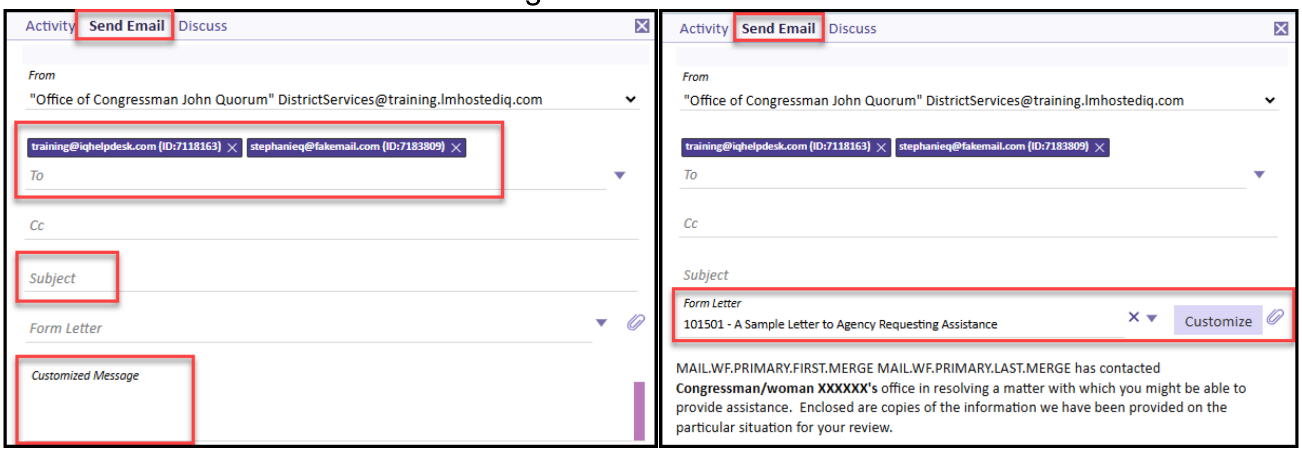
ii. Use the content editor to type the custom reply. (To utilize the full screen option for the editor, click the ).



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.



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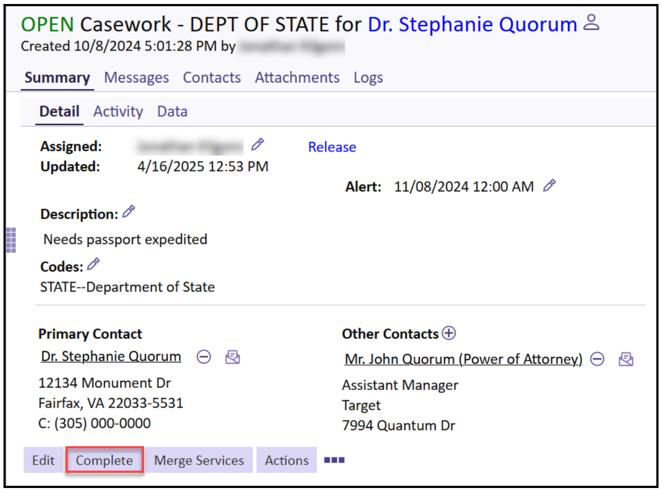
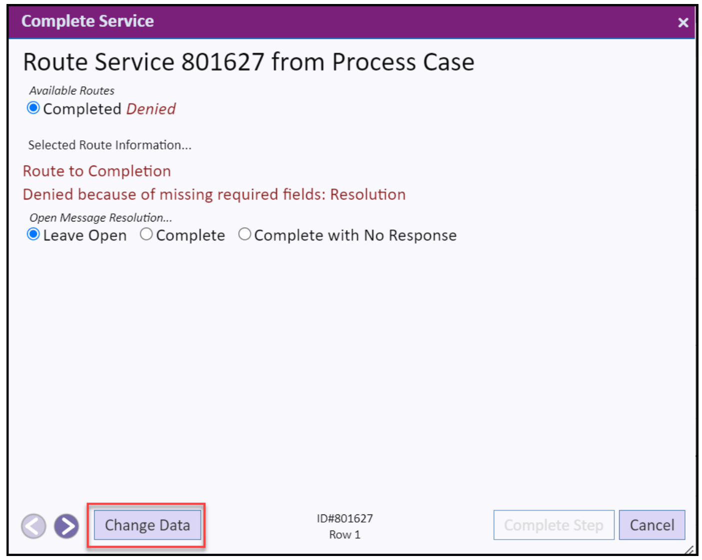
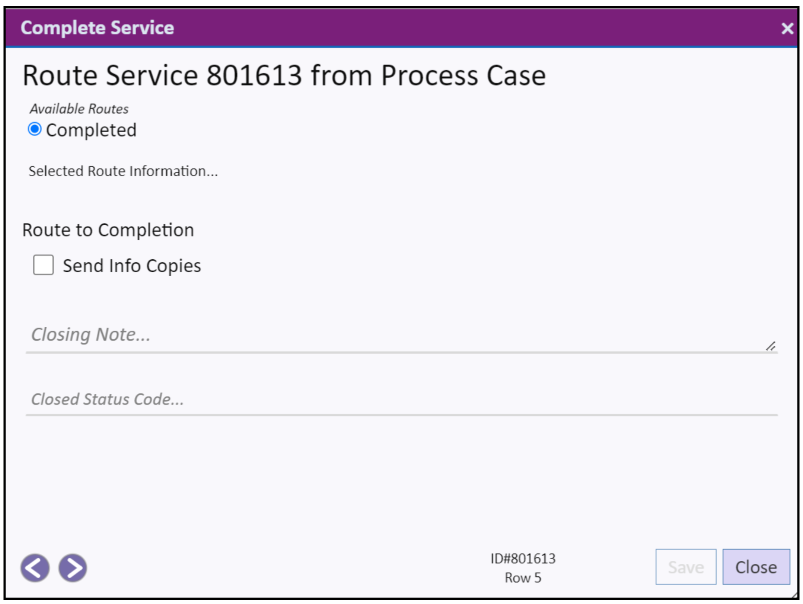
Closing the Case

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.





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



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Finding and Reopening a Closed Service

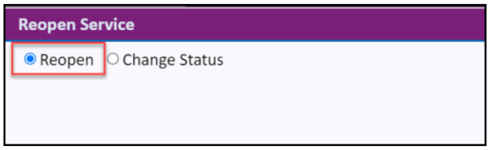
Note: You must have specific security permission to reopen a closed Service. Talk to your IQ Consultant if you don't have permission and need it enabled.

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**.



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Managing Cases from the List View

1. Navigate to your Open Cases by clicking on the Casework icon.
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**.

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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.

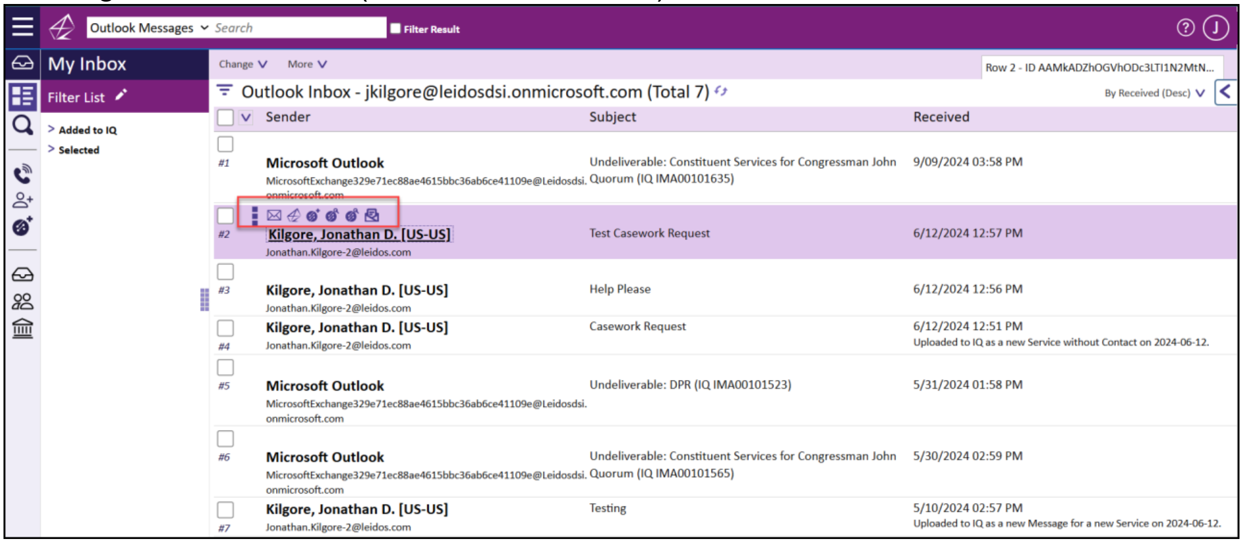
1. First connect your Office 365 account with IQ by going to User Settings → Outlook.
2. Type your O365 email and click **Get Access Token**.
3. Sign in on the following page. Once Signed in a new page will appear showing that you were successful.
4. Go back to IQ5 and navigate to the **My Inbox** application.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

   a. Clicking on the Views icon next to the **Filter List.**

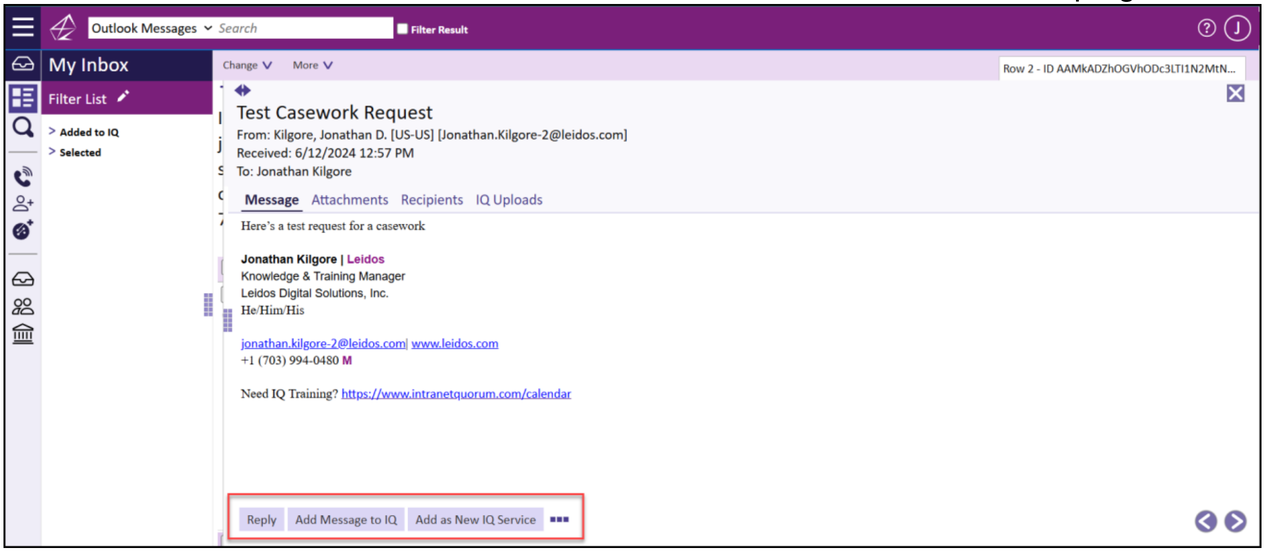
   b. Click on the icon next to **Views.**

   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).

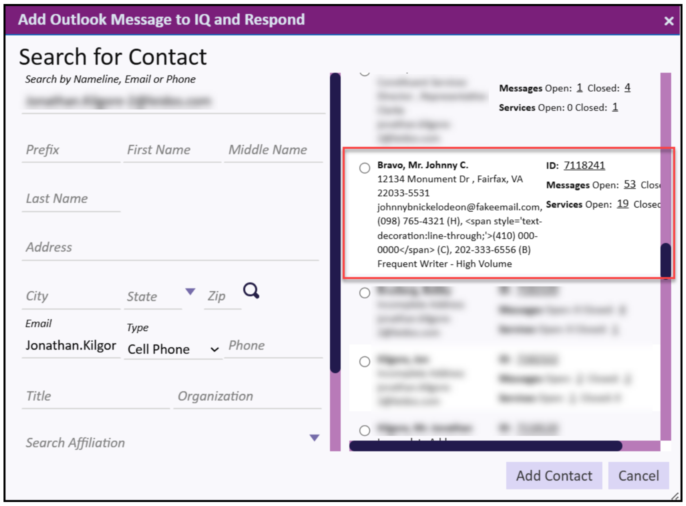


7. Click the Email in the List to see it in more detail. Click the X button in the top right when done.

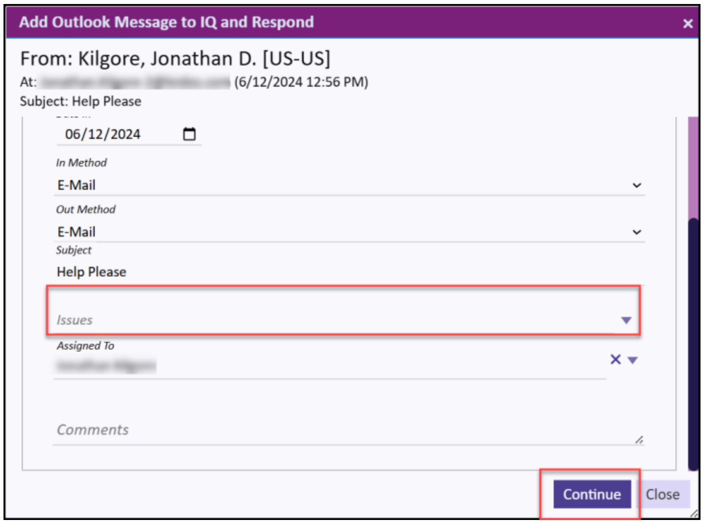


Replying to Outlook Emails in the My Inbox Application

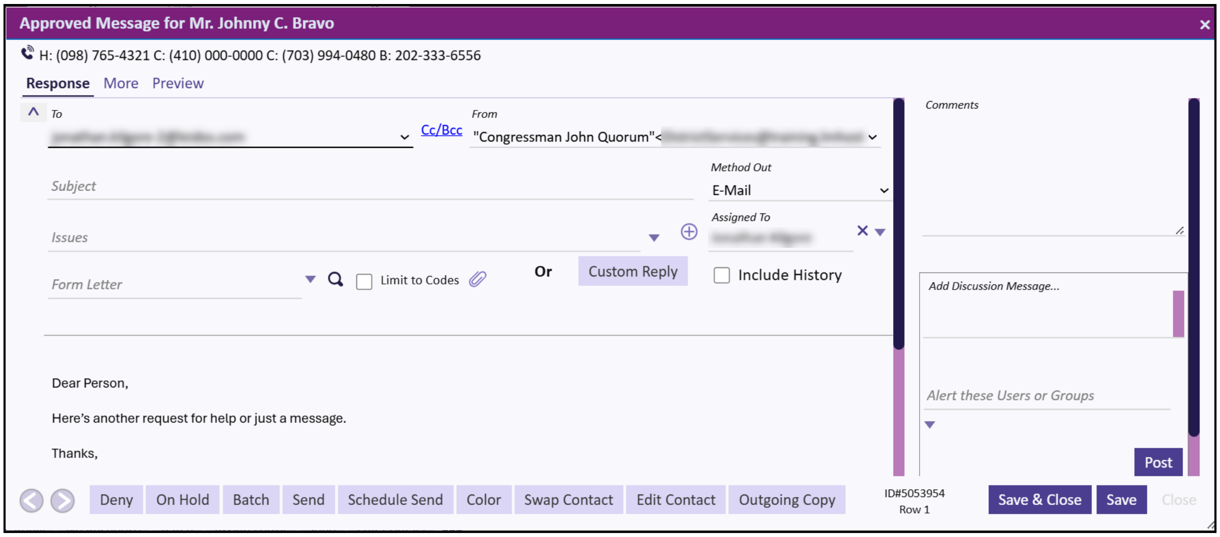
1. Click on the Email you want to reply to and click **Reply** in the reading pane or through the  icon.
2. Match the email with an existing IQ Contact Record. If there is no match, click **Add Contact** to create a new record for the sender of the email.



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

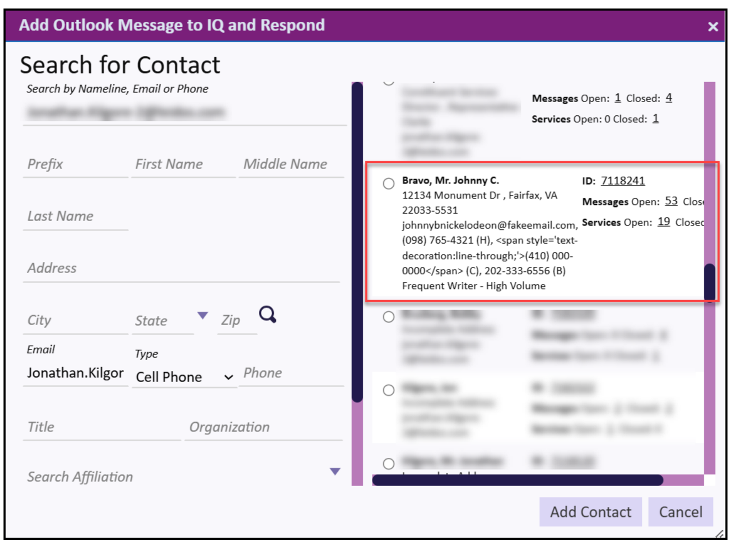


4. The email has now been added to IQ as a Message and the response window appears, allowing you to review the email and write a custom reply or select a Form Letter as appropriate.
5. Click **Send** when ready.



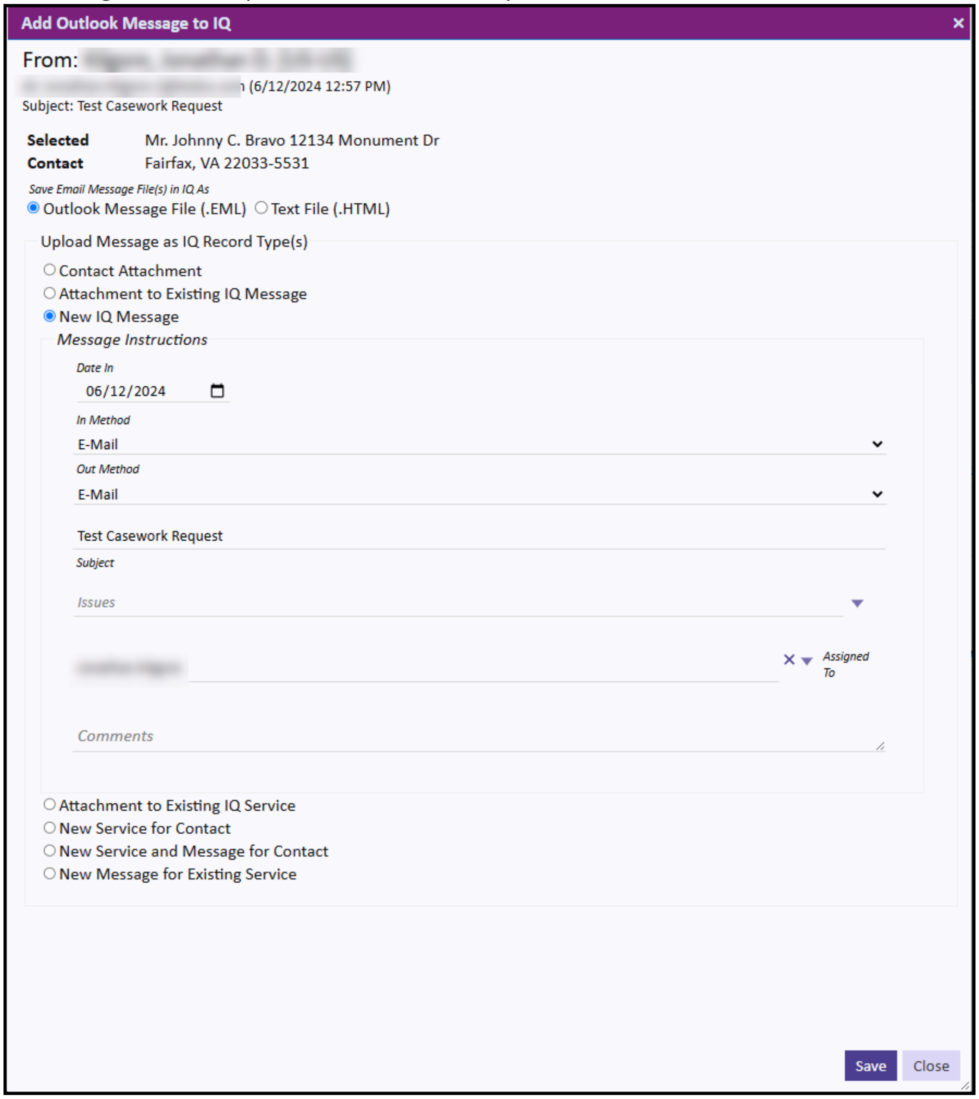
Adding Outlook Emails to a New or Existing Service

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.

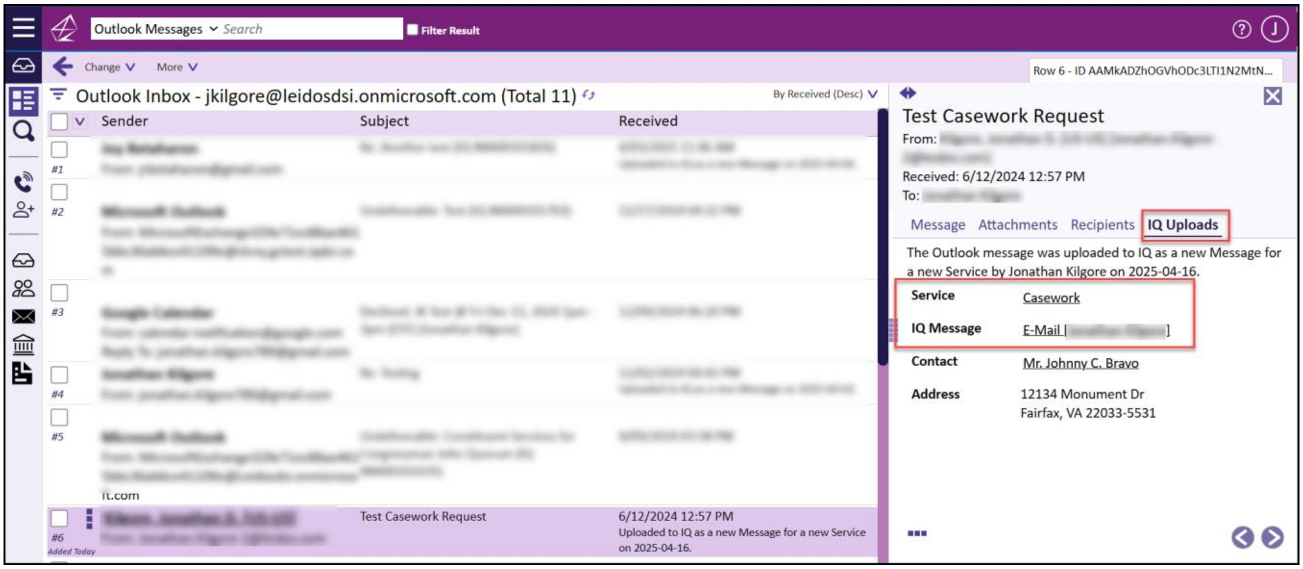


3. Review the Selected Contact information and then choose what you would like to do from the following (hover over each option for a tooltip definition if needed):
   a. **Contact Attachment:** Adds the email as an attachment to the Contact record.
   b. **Attachment to Existing IQ Message:** Adds the 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).

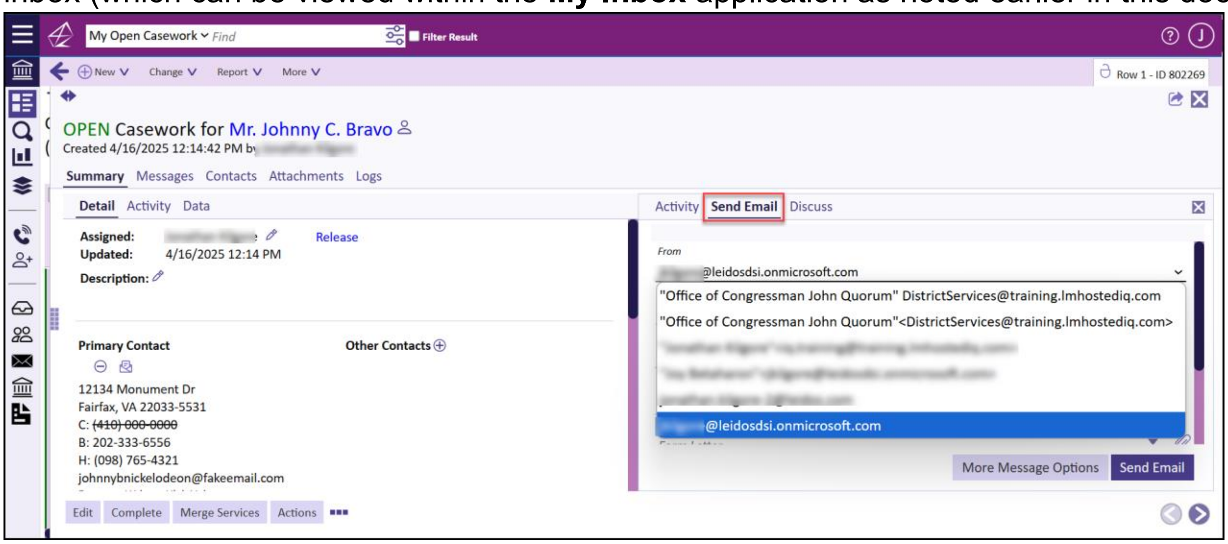


4. If you select any of options D-G above, IQ will prompt you to find the existing Service and/or choose what type of service to be created with this email.
5. Click **Save**. Your screen will be brought back to the My Inbox application. Click on **IQ Uploads** in the Reading pane to access the existing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



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