

Logging Calls in IQ5

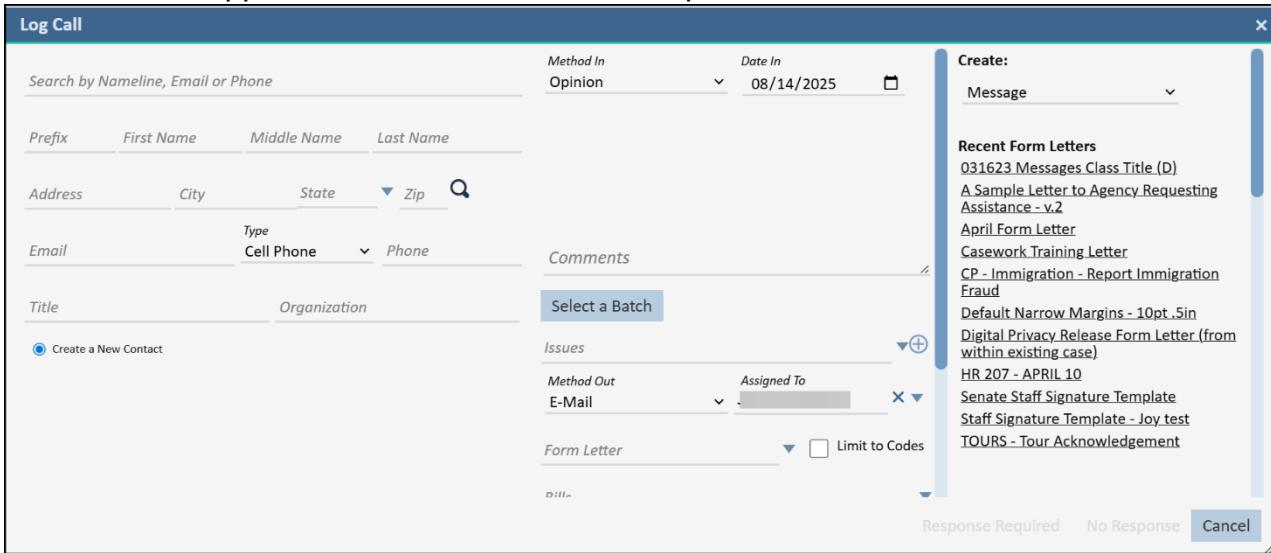
Market: House, Senate

Description: The IQ Opinion Center allows user to capture constituent information quickly into IQ, which immediately creates IQ records that can be processed. These instructions teach users how to **create new constituent opinion records, search for these records, and manage information in the Opinion Center**. This guide also instructs users **how to create a new Service record from the Log Call Screen**.

Logging a Call



1. Click on the **Log Call**  icon on the left side of the screen.
2. The Log Call page is displayed. The left column is where the constituent's contact is selected. The middle column is where the opinion is documented and is associated with IQ fields (e.g., affiliations, issues, bills, batches, etc.). The right column is a set of links and selections to support the documentation of the opinion.



The screenshot shows the 'Log Call' interface. The left column contains fields for 'Prefix', 'First Name', 'Middle Name', and 'Last Name'. The middle column contains fields for 'Address', 'City', 'State', 'Zip', 'Email', 'Type' (set to 'Cell Phone'), and 'Phone'. The right column contains a 'Comments' section with a 'Select a Batch' dropdown, an 'Issues' section, and a 'Form Letter' dropdown. A 'Create' section on the right lists 'Message' and 'Recent Form Letters' (including '031623 Messages Class Title (D)', 'A Sample Letter to Agency Requesting Assistance - v.2', 'April Form Letter', 'Casework Training Letter', 'CP - Immigration - Report Immigration Fraud', 'Default Narrow Margins - 10pt .5in', 'Digital Privacy Release Form Letter (from within existing case)', 'HR 207 - APRIL 10', 'Senate Staff Signature Template', 'Staff Signature Template - Joy test', and 'TOURS - Tour Acknowledgement').

3. The best practice is to start filling out the middle column first to capture the details of the constituent's call. The right-hand columns information can be used to assist with capturing the details of the call by clicking on the comments to add them in or by clicking on the issues to add those to the call. Below is a breakdown of each field:

Middle Column:

<i>Method In</i> Opinion	<i>Date In</i> 08/14/2025	<input type="button" value="□"/>
<i>Comments</i>		
<input type="button" value="Select a Batch"/> <i>Issues</i>		
<i>Method Out</i> E-Mail	<i>Assigned To</i>	<input type="button" value="x"/> <input type="button" value="▼"/>
<i>Form Letter</i> <input type="checkbox"/> Limit to Codes		

<i>Bills</i>
No options available.
<input type="radio"/> Supports <input type="radio"/> Opposes <input type="radio"/> No Position
<input type="button" value="Select File(s)"/> - or - Drop File(s) Here
<i>Affiliations</i>

- **Method In:** Select the method in which the opinion originated
- **Date In:** The current days date will be auto selected.
- **Comments:** Use this field to capture the details of the opinion.
- **Select a Batch:** If appropriate, select a batch for the opinion to be placed into.
- **Issues:** Select the appropriate issue code to associate with the opinion.
- **Method Out:** Select the method to respond to the opinion if a response is required.
- **Assigned To:** Select the staff the opinion record should be assigned to.
- **Form Letter:** Choose a letter that can be used to respond to the constituents' opinion.
- **Limit to Codes:** If selecting a form letter, checking this box will limit the results to those letters with the specific issue code.
- **Bills:** If Constituent is calling concerning a bill, select the appropriate one from the list and their position.
- **Select a file:** If necessary, attach relevant files

	<p>associated with the opinion.</p> <ul style="list-style-type: none"> • Affiliations: Select the appropriate affiliation code(s) to associate with the constituent
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Right Column:

<p>Create:</p> <p>Message</p> <p>Recent Form Letters</p> <p>031623 Messages Class Title (D)</p> <p>A Sample Letter to Agency Requesting Assistance - v.2</p> <p>April Form Letter</p> <p>Casework Training Letter</p> <p>CP - Immigration - Report Immigration Fraud</p> <p>Default Narrow Margins - 10pt .5in</p> <p>Digital Privacy Release Form Letter (from within existing case)</p> <p>HR 207 - APRIL 10</p> <p>Senate Staff Signature Template</p> <p>Staff Signature Template - Joy test</p> <p>TOURS - Tour Acknowledgement</p> <p>Phone Script for BUD - Budget and Economy</p> <p>Lore ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.</p>	<ul style="list-style-type: none"> • Create: Select which type of record will be created once the opinion is logged. The availability of options can be configured based on a user's role. Contact your IQ Consultant for details. • Recent Form Letters: This lets you select from a list of Form Letters you have sent recently in response to constituents. • Phone Script: This will display if your office added a phone script to the issue code used to tag the opinion. • Common Issues: Based on historical data, IQ displays a list of issue codes that were previously used for opinions. By clicking one, IQ will automatically populate the Issue field. • Common Comments: Based on historical data, IQ displays a list of opinion comments that were previously entered. By clicking on one, IQ will automatically populate the Comments field.
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Common Issues

[MEDICAID -- Medicaid \(9\)](#)
[BUD -- Budget and Economy \(7\)](#)
[TARIFF -- Tariffs \(7\)](#)
[HEA -- Health \(3\)](#)
[INT -- International Relations \(2\)](#)
[TIK TOK -- For issues relating to Tik Tok \(1\)](#)
[BORDER SECURITY -- Border Security issues \(1\)](#)

Common Comments

-  Tariffs (4)
-  The caller is concerned about cuts to medicaid. (3)
-  Tariffs - This is my opinion on tariffs.... (2)
-  The constituent is calling with concerns over medicaid. (2)
-  The caller is calling with concerns regarding cuts to Medicaid. (2)
-  Questions about Boards and applications (1)
-  Caller concerned about border security. This is what I did. (1)
-  Caller concerned about border security (1)
-  The caller is worried about Tik Tok getting banned again. (1)
-  The caller is concerned about tariffs. (1)
-  The caller is calling with questions and concerns

4. After capturing the call, use the left-hand column to match the call with a constituent in your database. If they don't exist, **Create a New Contact** is selected by default and will create a new contact record once the call is logged. *Contacts can be created with just a phone number if necessary.*

Log Call

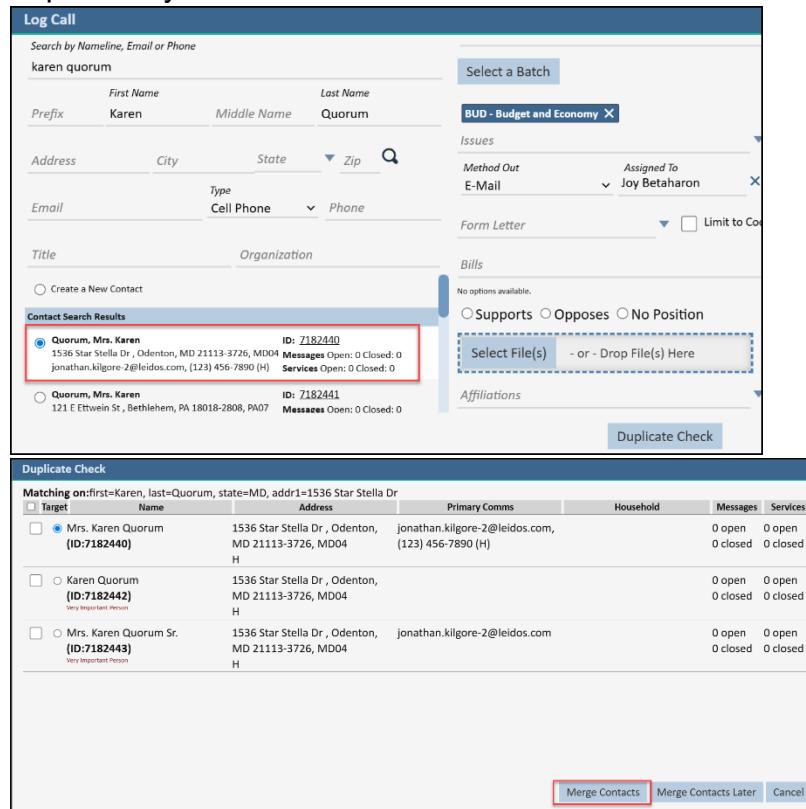
Search by Nameline, Email or Phone

Prefix	First Name	Middle Name	Last Name
Address	City	State	Zip
Email	Type Cell Phone	Phone	
Title	Organization		

Create a New Contact

5.

a. ***Note:** If you notice duplicate contact records while searching for the caller, you can select one of those contacts, click **Duplicate Check** at the bottom, and merge the duplicates you have found.



The screenshot shows the 'Log Call' interface. In the search bar, 'karen quorum' is entered. The contact search results list two entries for 'Quorum, Mrs. Karen':

- Quorum, Mrs. Karen (ID: 7182440) - Address: 1536 Star Stella Dr, Odenton, MD 21113-3726, MD04 - Primary Comms: Jonathan.kilgore-2@leidos.com, (123) 456-7890 (H) - Status: Messages Open: 0 Closed: 0 Services Open: 0 Closed: 0
- Quorum, Mrs. Karen (ID: 7182441) - Address: 121 E Ettwein St, Bethlehem, PA 18018-2808, PA07 - Primary Comms: - Status: Messages Open: 0 Closed: 0

A red box highlights the first contact. To the right, a 'Duplicate Check' dialog box is open, showing the matching results for 'Mrs. Karen Quorum (ID: 7182440)'. The table has columns: Target, Name, Address, Primary Comms, Household, Messages, and Services. The 'Target' row is selected with a blue radio button. The other two rows are empty checkboxes.

Matching on: first=Karen, last=Quorum, state=MD, addr1=1536 Star Stella Dr						
Target	Name	Address	Primary Comms	Household	Messages	Services
<input type="checkbox"/>	<input checked="" type="radio"/> Mrs. Karen Quorum (ID: 7182440)	1536 Star Stella Dr , Odenton, MD 21113-3726, MD04 H	jonathan.kilgore-2@leidos.com, (123) 456-7890 (H)		0 open 0 closed	0 open 0 closed
<input type="checkbox"/>	<input type="radio"/> Karen Quorum (ID: 7182442) <small>Very Important Person</small>	1536 Star Stella Dr , Odenton, MD 21113-3726, MD04 H			0 open 0 closed	0 open 0 closed
<input type="checkbox"/>	<input type="radio"/> Mrs. Karen Quorum Sr. (ID: 7182443) <small>Very Important Person</small>	1536 Star Stella Dr , Odenton, MD 21113-3726, MD04 H	jonathan.kilgore-2@leidos.com		0 open 0 closed	0 open 0 closed

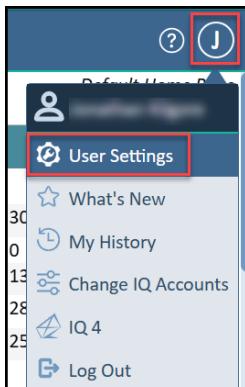
At the bottom of the dialog box are buttons: 'Merge Contacts' (highlighted with a red box), 'Merge Contacts Later', and 'Cancel'.

6. Finally, choose one of the following options:

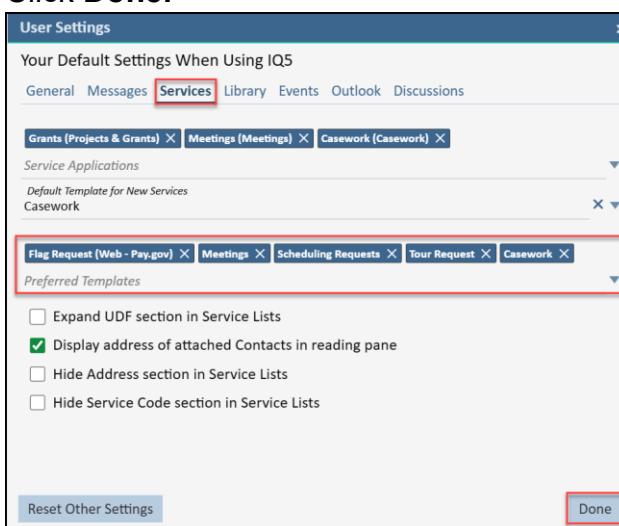
- Response Required:** If the constituent wants a follow up call, email, etc. choose response required. Make sure you have assigned the call to the correct person first.
- No Response:** If the constituent called to just give an opinion and needs no follow up, choose no response.

Creating a New Service from the Log Call Screen

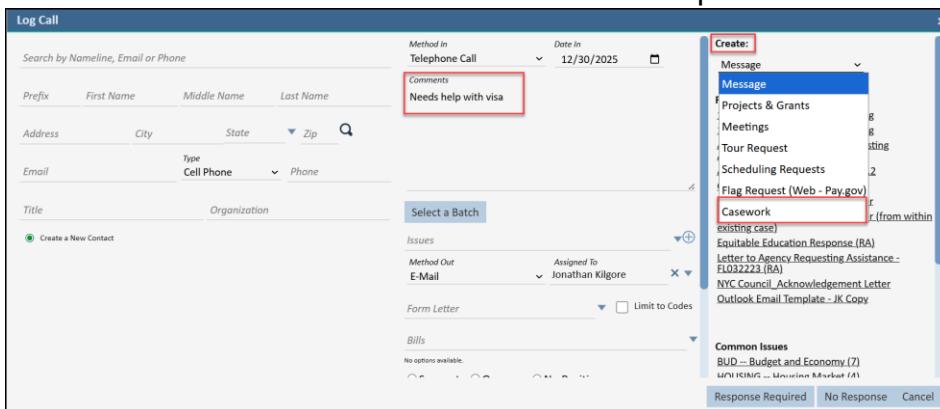
1. Click on your first initial in the top right corner, then click on **User Settings**.



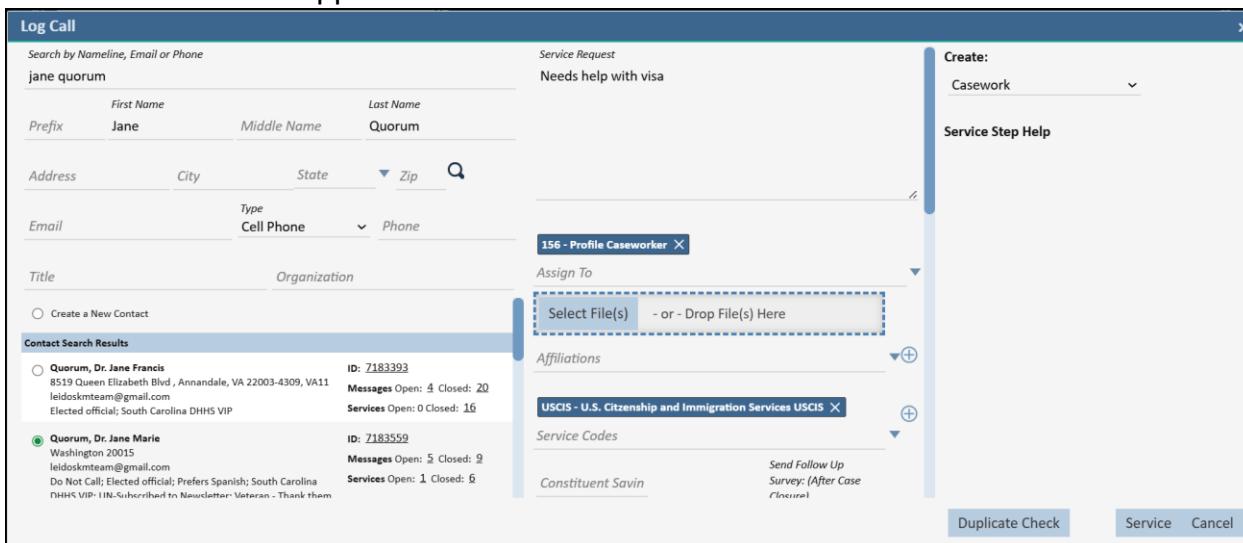
2. Click on **Services**.
3. Click into **Preferred Templates** and add the Services you would like to create within the Log Call screen.
4. Click **Done**.



5. Click on the Log Call icon.
6. Best practice when logging a call is to click into the Comments section. Then write out the callers request, which in this example is a request for casework.
7. Click on **Create**. Choose **Casename** from the dropdown.



8. The Comments field becomes the Service Description, and the other fields in the Middle Column become fields for your selected Service.
9. Fill out those fields as appropriate, such as Service Code and Assigned To.
10. Follow the above steps for finding the Contact who is calling. This Contact will become the **Primary Contact** in the Service.
11. Click **Service** in the bottom right when ready to create the new Service Request. A confirmation link will appear at the bottom and the screen will reset.



The screenshot shows the 'Log Call' interface. At the top, a search bar shows 'jane quorum'. Below it, a table shows 'First Name' (Jane) and 'Last Name' (Quorum). Further down, there are fields for 'Address', 'City', 'State', 'Zip', 'Email' (Cell Phone), and 'Phone'. A 'Title' and 'Organization' field are also present. On the right, a 'Service Request' section shows 'Needs help with visa'. A 'Create' dropdown is set to 'Caserwork'. A 'Service Step Help' section shows '156 - Profile Caseworker'. Below this, an 'Assign To' section has a 'Select File(s)' button. A 'Contact Search Results' section lists two contacts: 'Quorum, Dr. Jane Francis' and 'Quorum, Dr. Jane Marie'. The second contact is selected. At the bottom right are 'Duplicate Check', 'Service', and 'Cancel' buttons.

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