Adding Service Codes and Agency Contacts

Market: House, Senate

Description: In IQ, **Service Codes** refer to codes for agencies that assist with the service. When a contact is connected to a Service Code, they are referred to as an **Agency Contact**. These instructions teach users how to create service codes and agency contacts.

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[Use a Service Code to Create an Agency Contact](#)

[Create an Agency Contact from a New Contact Record](#)

[Attach Agency Contacts in a Service Record](#)

Creating a Service Code

1. Navigate to the **Services** application.
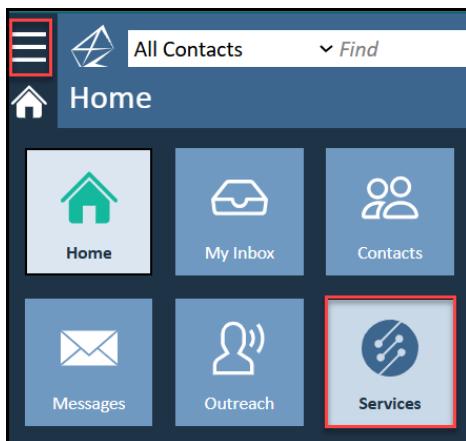
2. Select the **Code Lists and Utilities** option from the Action Icons, then select **Service**.
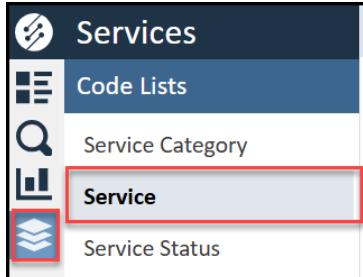
3. A complete list of Service Codes appears. To add a new service code, click **+New → Add Service Code**.
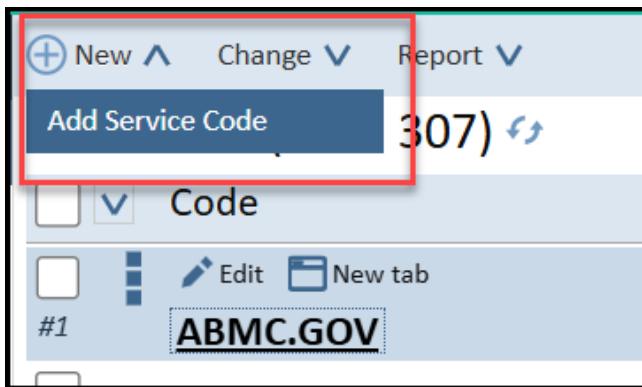
4. Complete the fields below.
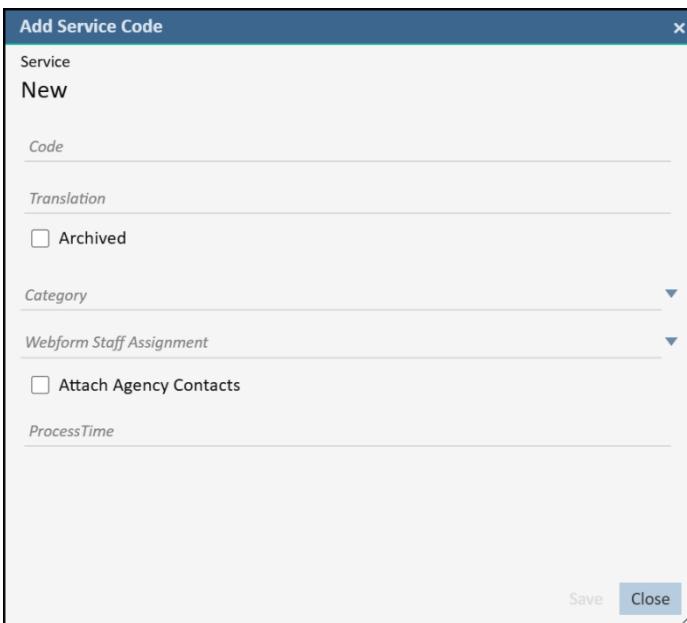
- Enter a **Code** name. Typically, this is a shortened version of the code name.
- Enter a **Translation**. This is generally a more detailed explanation of the code.
- The **Archive** check box is used if you wish to remove the code from active use. Once used, codes cannot be deleted as they are associated with records.
- Include a **Category** if you wish to associate this code with a category.
- The **Webform Staff Assignment** assigns new Services with this code to a particular user if the Service is created using a Webform.

- If you would like all Agency Contacts with this Service Code included in every Service record with this code, check the **Attach Agency Contacts** check box. Leaving the box unchecked will allow you to manually attach Agency Contacts each time you add this Service Code.
- If you would like a default Due Date to appear in a Service record with this Service Code, enter the default **process time**.

5. Click **Save** to save your changes.

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Use a Service Code to Create an Agency Contact

Agency Contacts are typically people that work at an outside agency or office and assist in resolving issues you are handling in IQ Services. Agency Contacts are distinguished by attaching an Agency Code to a Contact record. When that same Agency Code is attached to a new Service record as a Service Code, all Contact records with the same code can be made to appear in the Service and can be easily selected for messaging. This means you spend less time searching for your contact and can also search and report on all contacts in an agency using the Agency Code or Category search.

Create an Agency Contact from a New Contact Record

1. Click on the **Find or Add a Contact** action icon .
2. Type in the Agency Contact information. If they already exist, you will see and be able to select their contact record on the right-hand side. If they do not exist, continue entering in their information and be sure to scroll down to add the appropriate **Agency Code.** Click the **Add Contact** button when finished.

Create/Attach Agency Contacts in a Service Record

1. Search for and open the service record.
2. In the service, click ⊕ next to **Other Contacts**.
3. Click the **Find and Add** tab. Add your contact information, then click **Add Agency Code** and select the Agency this contact works for.
4. Click **Attach New Contact to Service** to create the new Agency Contact.

5. To find existing Agency contacts, select the **Agency Contacts** tab. IQ will perform a search for Agency contacts based off of the service code(s) on the case.
6. Select the correct agency contact, then click **Attach to Service**.

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