

Performing Service Record Activities

Market: House, Senate

Description: These instructions teach users how to complete a service template.

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Completing the Detail Page


As soon as you create a new Service, regardless of type, the user is redirected to the **Detail Page**, which is the template that is customized for that service.

1. Enter in the details in the **Description** field for the Casework (or other service).
2. Click on the Calendar icon of the **Alert** field to select a date that you want to be Alerted on to follow up with this Service. Click in the Time field 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.
3. Type in a **Service Code** to indicate which Federal Agencies (if any) are going to be involved in this Service.
 - a. **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.

4. Continue to complete the case/service information further down. Note that tabs displayed can be unique to each office. Fill out the fields as you have 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.
5. Click **Save & Close** or **Save**.
 - a. **Save and Close:** Saves the entered information and returns you to the previous screen you were on.
 - b. **Save:** Saves the information entered without closing it. 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. If the Service was created anywhere else, click the  icon next to **Other Contacts**.
 - a. **Note:** There can only be **one** Primary contact for each service.
2. 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.

The image shows two side-by-side screenshots of the 'Attach Other Contact' dialog box. The left screenshot shows the 'Find' tab with a search bar and a list of contacts. The right screenshot shows the 'Find and Add' tab with a search bar and a list of contacts. Both screenshots show the 'Attaching as Other Contact' section with fields for Affiliations and Add Agency Code.

The image shows a screenshot of the 'Attach Other Contact' dialog box with the 'Agency Contacts' tab selected. It displays a list of search results for 'Quorum, Mr. Leidos' with details like ID, Messages Open, and Services Open.

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Adding Attachments

1. When Editing the details of the Service, click the  icon to upload files.
2. Alternatively, click either the  next to the **Actions** button, or click the  next to **Attachments**, and select **Attach File**.

3. 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.

4. Click **Save**.
5. Review your attached documents in the **Edit or Activity** sections or **Attachments** block.

Activity
Send Email
Discuss

Add a note...

Search...

All
Message
Notes
Attachments

Joy Betaharon
Supplemental docs

A Sample Attachment.docx

8/26/2025 - 02:25 PM

OPEN Casework for Mr. John Quorum
Created 7/1/2025 3:42:10 PM by Jonathan Kilgore

Summary
Messages (5)
Contacts (1)
Logs

Detail
Activity
Data

training@iqhelpdesk.com
B: (704) 000-0000
National Press; Newsletter Subscriber;
Very Important Person

Attachments
A Sample Attachment.docx

Library Files

Events

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Adding Notes

- Notes can be added within the **Edit** screen of a Service or by clicking on the field directly under **Activity**.
- Type in your **Note**, then click **Post**.
 - *Note:** Each note has a 4000 character limit.

Edit Casework

Description
Request for help expediting a passport.

Opened
Date 01/15/2026 Time 04:41 PM

Alert
Date 01/16/2026 Time --:--

Attachments
03_IQS 1.9 User Settings.pdf

STATE - Department of State

Service Codes

Process Status
Pending

Constituent Savings: Dollar Amount

Send Follow Up Survey: (After Case Closure)
No

Resolution:*

Complete ID#802434 Row 1

Activity Discuss

Add a note...
Here's my note!

Remaining Characters: 3953

Search...

☒ All ☐ Message ☐ Notes
☐ Attachments

Jonathan Kilgore
Information Copies Sent to: Jonathan Kilgore.
Subject: ALERT: Call Primary Contact
Message:
Here's what I need to discuss with Chelsea....
Contact: Dr. Chelsea Quorum
1/19/2026 - 12:00 AM


Save & Close Save Close

Activity Send Email Discuss

Add a note...

Post

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**.

Log Service Call

Contact
MR. JOHN QUORUM (ID:7118163)


Call Type
☒ Incoming ☐ Outgoing

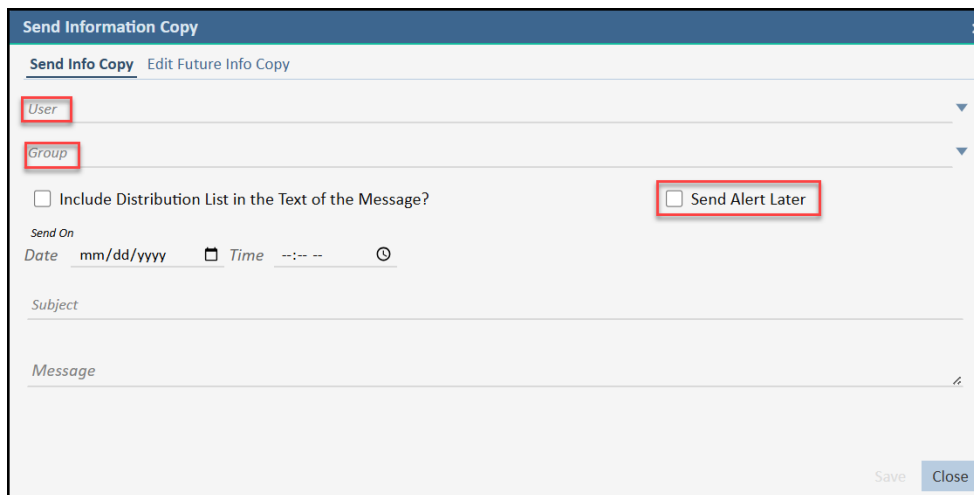
Note
Type details of the call here.

Attach Close

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Creating Custom Alerts/Sending an Information Copy/Editing Future Info 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. Type into **Subject** the name of the Alert. For Example, "Call Primary Contact today".
- c. Type into **Message** 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. Type into the **Message** field the body of text that will be sent to users.
 - b. Click **Save**.

6. If **Editing Future Info Copy**, click the tab name and either delete or edit using the icons.

Send Information Copy

Send Info Copy

Edit Future Info Copy


Date	User	Group	Include Distribution List	Subject	Message
<div>✕</div> <div>8/28/2025</div>	Joy Betaharon		No	Alert - Follow up with Agency	Optional content can be written here.

Save

Close

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Add/Remove a Monitor

1. Click the  icon underneath the Note text area.
2. This opens the **Edit Service Monitor** dialog. 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. Choose whether to **Alert** the monitor **whenever the service updated**.
5. Select the **User(s) or Group(s)** that will be Monitors for this Service.
6. Type into the **Alert Text** field what the Alert should say when sent to the Monitor(s) after the Service closes.
7. Click **Save**.

Edit Service Monitor

Add Monitor

Remove Monitor

☒ Alert on Status Change
 ☒ Alert when service update

☒ Until Service is Complete
 ☐ Until Current Step is Complete

Bri Quorum

User


Group

Alert Text

This case has been resolved.

Save

Close


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

Edit Service Monitor

Add Monitor

Remove Monitor

You can only view or remove yourself and groups to which you belong.

Scope	User	Group	Alert	Alert Text
<div>  <div>SERVICE</div> </div>	Joy Betaharon		No	This case has been resolved.

Save

Close

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