Performing Service Record Activities

Market: House, Senate

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

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

Attaching and Removing Contacts

Adding Attachments

Adding Notes

Logging Phone Calls

Creating Custom Alerts/Sending an Information Copy/Editing Future Info Copy

Add/Remove a Monitor

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.

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

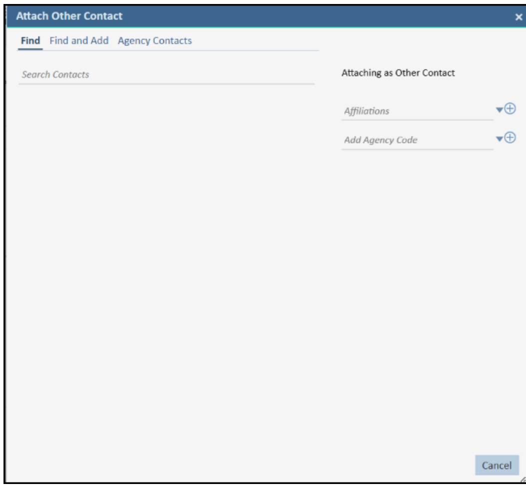
4. Continue to complete the case/service information further down. Note that tabs displayed can be unique to each office. Fill out the fields as you have the information. Remember these fields will change based on the Service chosen. You do **not** need to fill out all these fields at the time the Service 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.

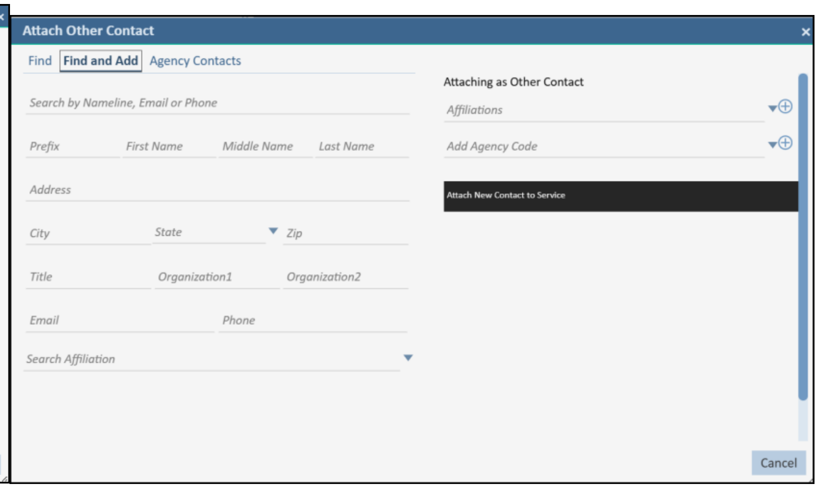
[Top of Page]

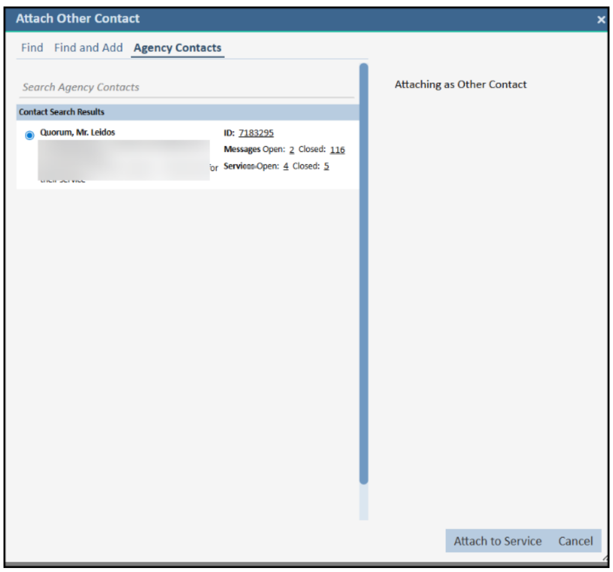
Attaching and Removing Contacts

1. If the Service was created from the Contact Record the **Primary Contact** field will have that Contact attached already. 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.

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.





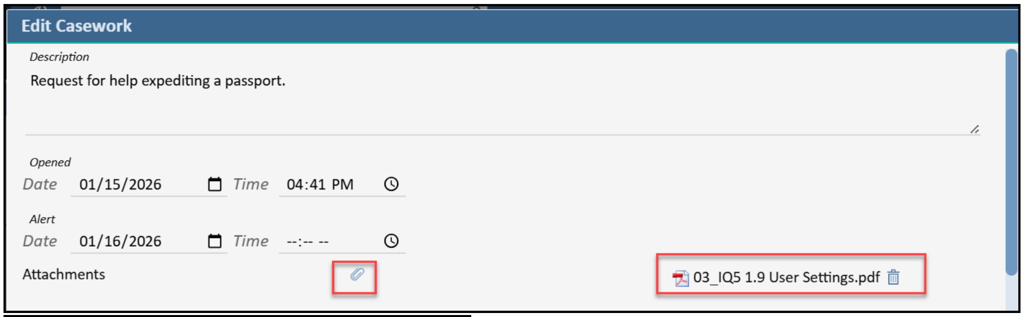


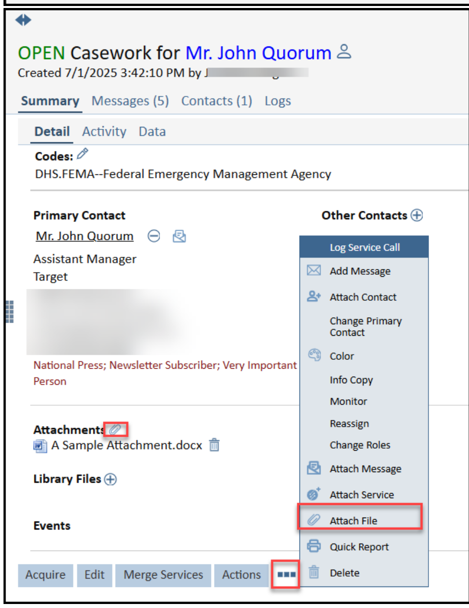
[Top of Page](#)

Adding Attachments

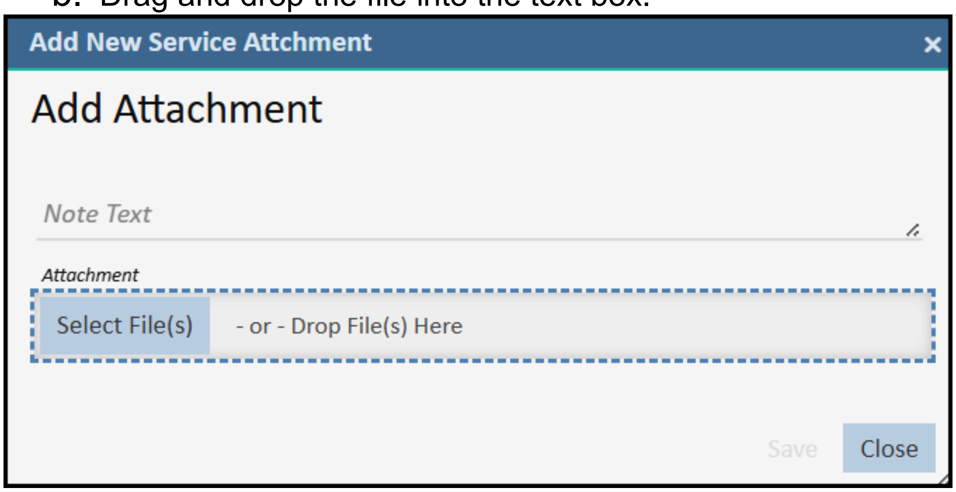
1. When Editing the details of the Service, click the icon to upload files.
2. Alternatively, click either the next to the **Actions** button, or click the next to **Attachments**, and select **Attach File**.

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.



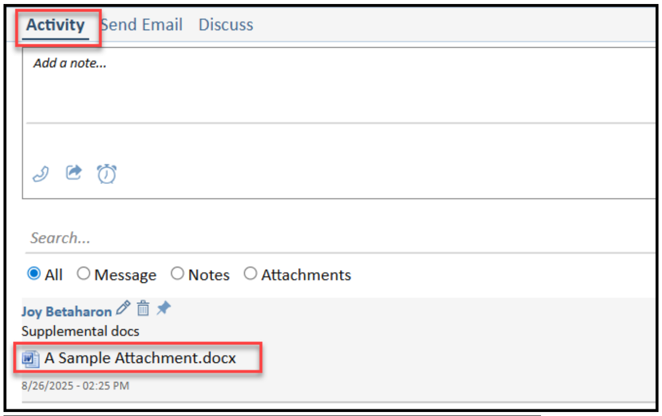


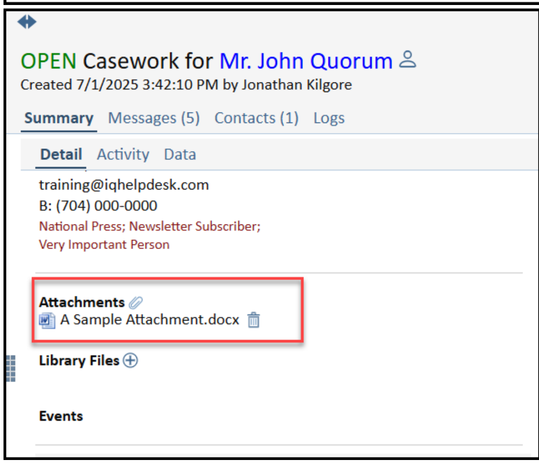
3. In the Add Attachment window, enter the Note Text, if desired, and either:
    a. Select a file to attach; or
    b. Drag and drop the file into the text box.



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

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.



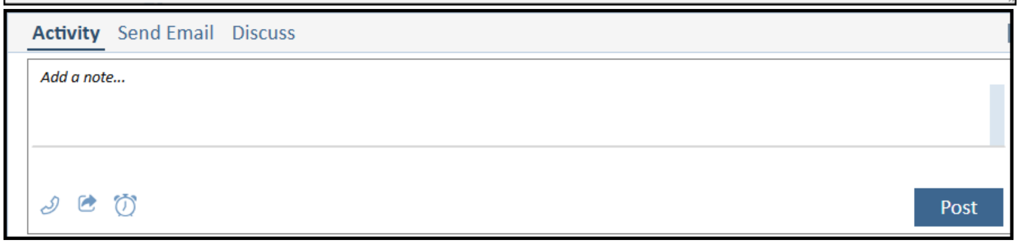


[Top of Page]

Adding Notes

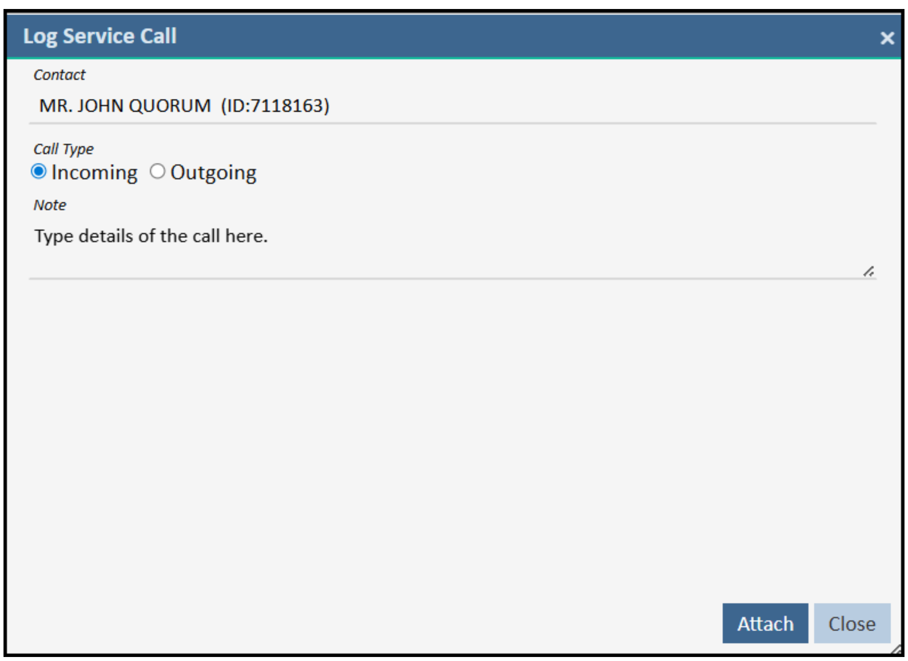
1. Notes can be added within the **Edit** screen of a Service or by clicking on the field directly under **Activity.**
2. Type in your **Note**, then click **Post.**
    a. ***Note:** Each note has a 4000 character limit.

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.



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**.

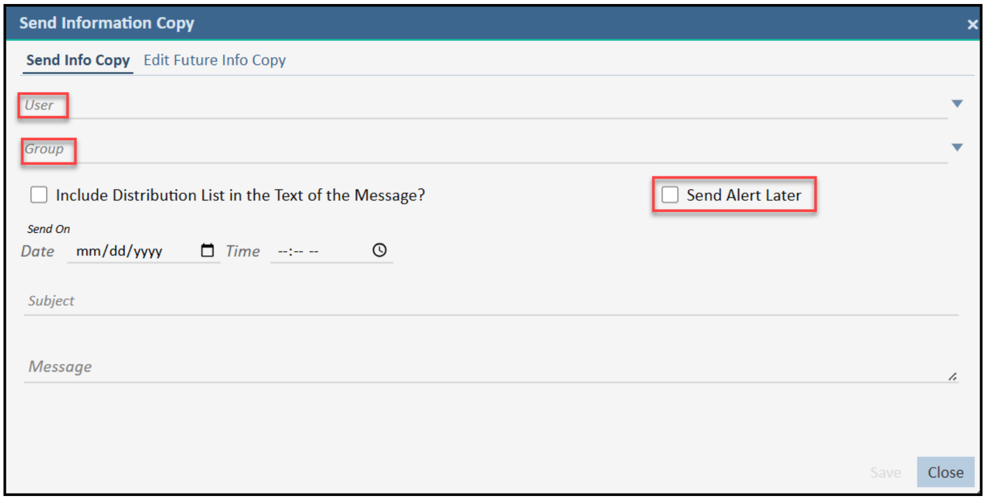


Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

[Top of Page](#)

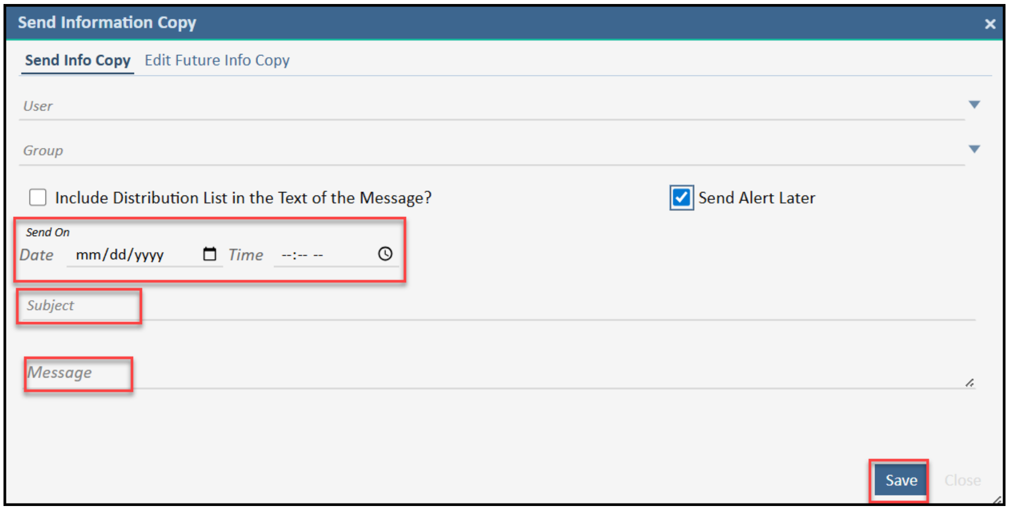
Creating Custom Alerts/Sending an Information Copy/Editing Future Info Copy

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.

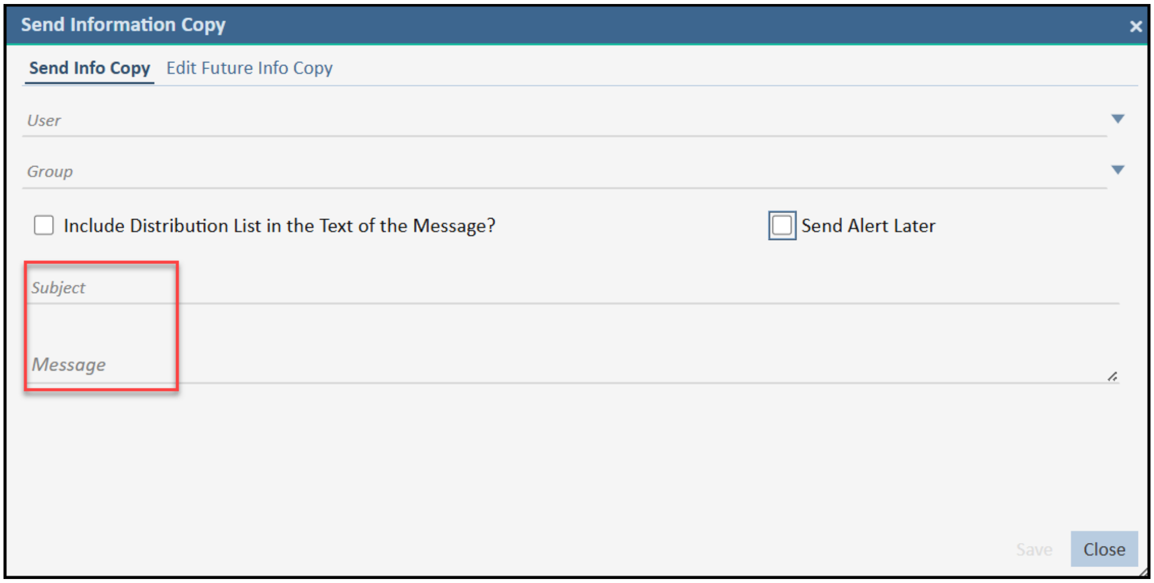


    a. The **Send On** fields now appear. Click into the **Date** and **Time** fields to choose when and at what time the Alert will send.
    b. Type into **Subject** the name of the Alert. For Example, “Call Primary Contact today”.
    c. Type into **Message** the details of the Alert. For Example, “Primary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

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

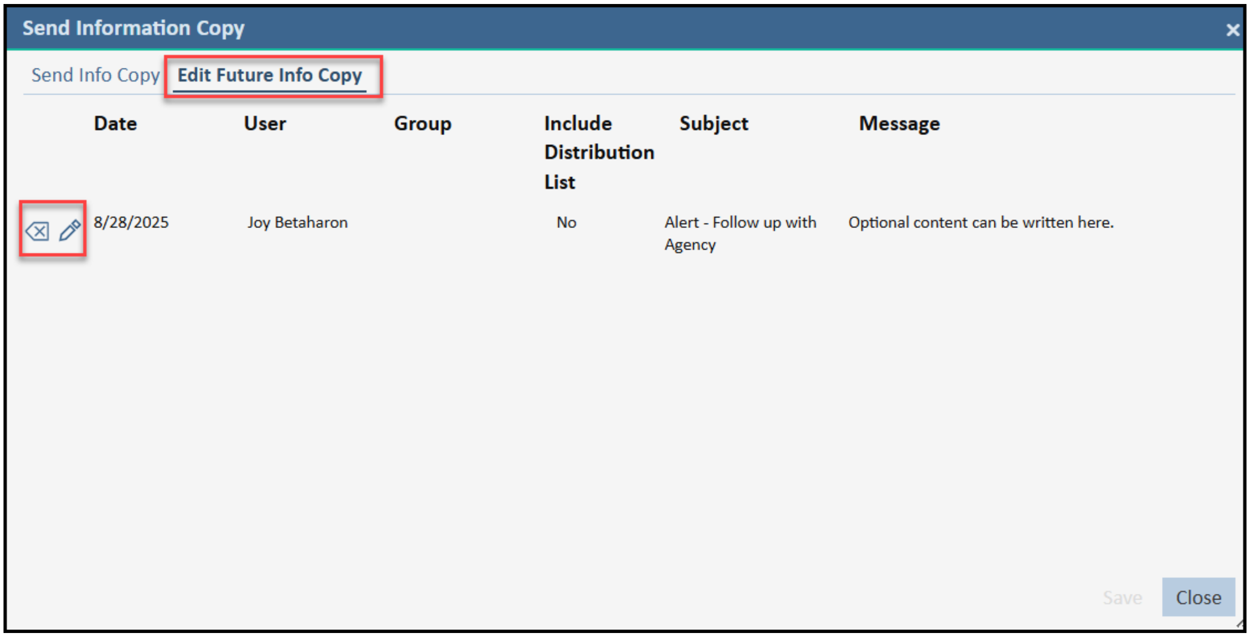


5. If sending an **Information Copy** type in a **Subject** line that will appear in the Users email.
   a. Type into the **Message** field the body of text that will be sent to users.
   b. Click **Save**.



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

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

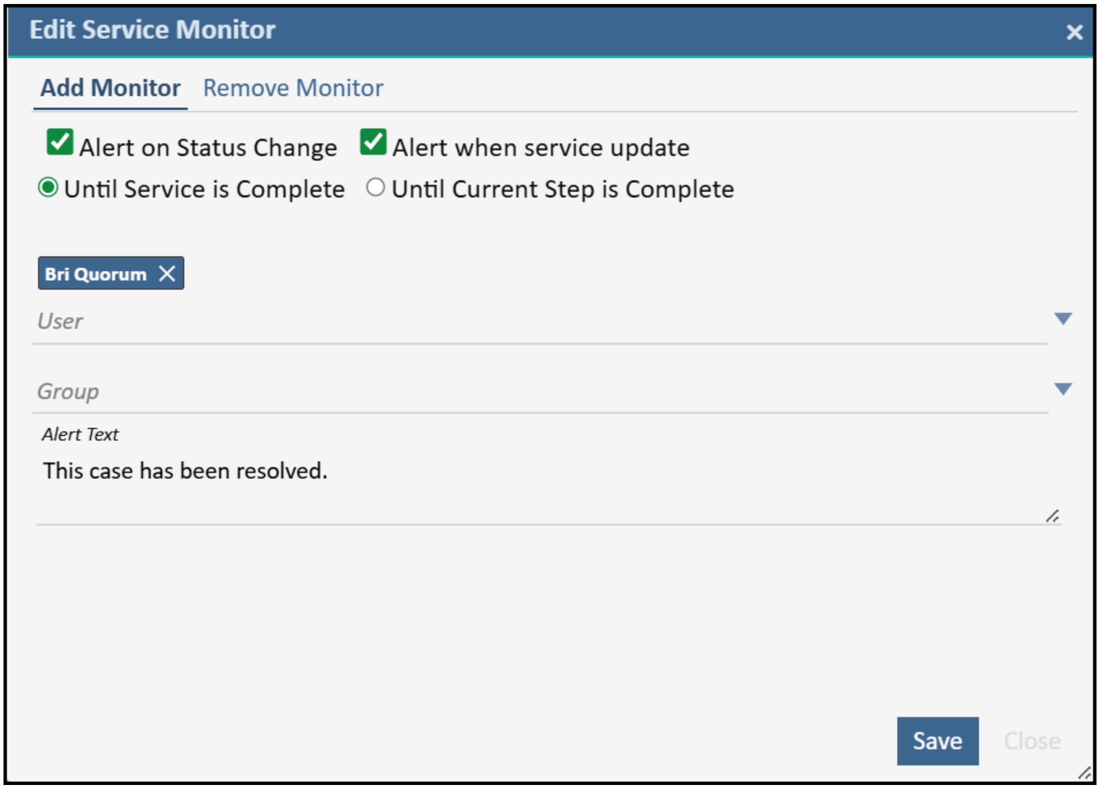


[Top of Page](#)

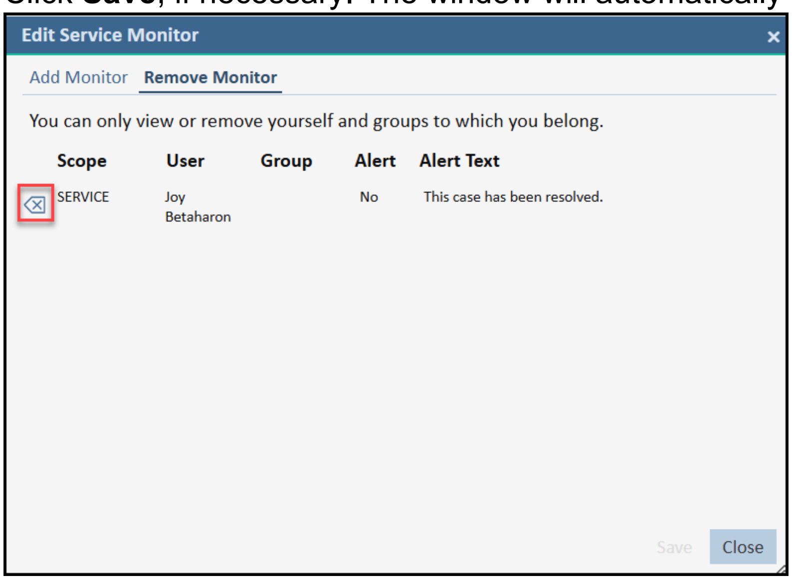
Add/Remove a Monitor

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**.

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.



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.



[Top of Page](#)

Leidos proprietary 2026
This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.