Requesting and Granting Approval of a Form Letter

Market: House, Senate

Description: Form Letters are customizable letters that you can use/reuse to respond to messages that are similar in nature; thus, reducing the need to create a new response to individual messages that are similar. After completion, these Form Letters can be sent for approval from one or more IQ users in your office, ensuring the quality of the Form Letter.

[Viewing list of Form Letters that need approval](#)

Requesting Approval for a Form Letter

1. Navigate to **Library → My Form Letters.** Select a letter and click "Edit" to open letter.
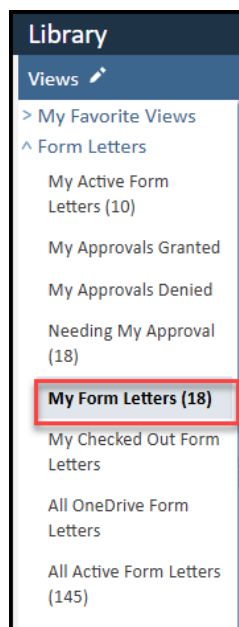
2. On the Draft Form Letter page, click the [***] and select **Request Approval**.

3. Click into the "By" field name and select an approver. Then click **Update**.

[Top of Page](#)

Viewing list of Form Letters that need approval

IQ will send an alert in IQ (and in MS Outlook, if configured) to the approver regarding the Form Letter. The approver can use these steps to view these requests.

1. Navigate to **Home → Library → Needing My Approval** view.
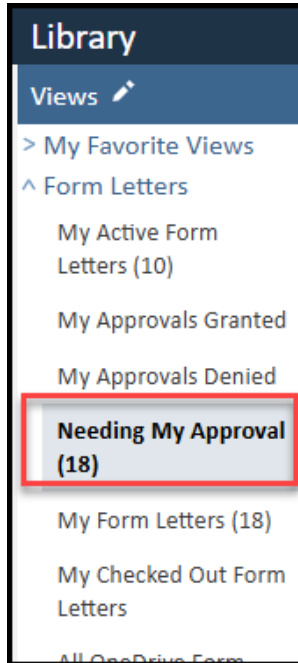
2. The list of letters requiring approval is displayed. Select the **Form Letter** to review.

3. On the Form Letter page, select **Approve**. To deny a request, select **Deny**.

[Top of Page](#)