

Logging Calls (The Opinion Center)

Market: House, Senate

Description: The IQ Opinion Center allows users to capture constituent communications 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 message/record from the Log Call Screen.**

Click the following links to be brought directly to the topic:

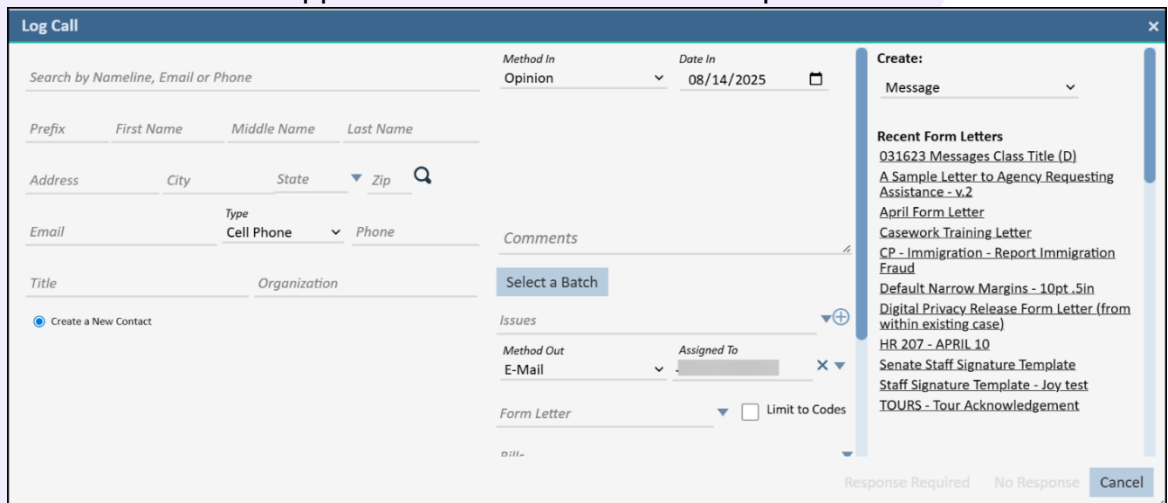
[Creating a new Service from the Log Call screen](#)

[Creating a new Service Message/Note 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.



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:

Method In
Opinion ▼

Date In
08/14/2025

Comments

Select a Batch

Issues ▼

Method Out
E-Mail ▼

Assigned To
 X ▼

Form Letter ▼ ☐ Limit to Codes

Bills ▼

No options available.

☐ Supports ☐ Opposes ☐ No Position

Select File(s) - or - Drop File(s) Here

Affiliations ▼

- **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 associated with the opinion. • Affiliations: Select the appropriate affiliation code(s) to associate with the constituent
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Right Column:

Create: Message  Recent Form Letters 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 TOURS - Tour Acknowledgement Phone Script for BUD - Budget and Economy Lorem 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. Duis aute irure	• Create: Select whether a Message, Service, or Service Message will be created. • 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 opinions logged that week so far, 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 opinions logged that week so far, 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 <u>MEDICAID -- Medicaid (9)</u> <u>BUD -- Budget and Economy (7)</u> <u>TARIFF -- Tariffs (7)</u> <u>HEA -- Health (3)</u> <u>INT -- International Relations (2)</u> <u>TIK TOK -- For issues relating to Tik Tok (1)</u> <u>BORDER SECURITY -- Border Security issues (1)</u> 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	
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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.

Log Call

Search by Name, Email or Phone
karen quorum

Select a Batch
BUD - Budget and Economy X

Issues
Method Out: E-Mail, Assigned To: Joy Betaharon X

Form Letter: Limit to Co

Bills
No options available.
Supports Opposes No Position

Select File(s) - or - Drop File(s) Here

Affiliations

Duplicate Check

Duplicate Check

Matching on: first=Karen, last=Quorum, state=MD, addr1=1536 Star Stella Dr

Target	Name	Address	Primary Comms	Household	Messages	Services
☒	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
☐	Karen Quorum (ID:7182442) Very Important Person	1536 Star Stella Dr, Odenton, MD 21113-3726, MD04 H			0 open 0 closed	0 open 0 closed
☐	Mrs. Karen Quorum Sr. (ID:7182443) Very Important Person	1536 Star Stella Dr, Odenton, MD 21113-3726, MD04 H	jonathan.kilgore-2@leidos.com		0 open 0 closed	0 open 0 closed

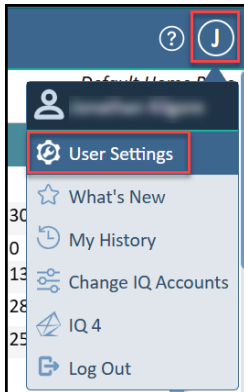
Merge Contacts Merge Contacts Later Cancel

6. Finally, choose one of the following options:

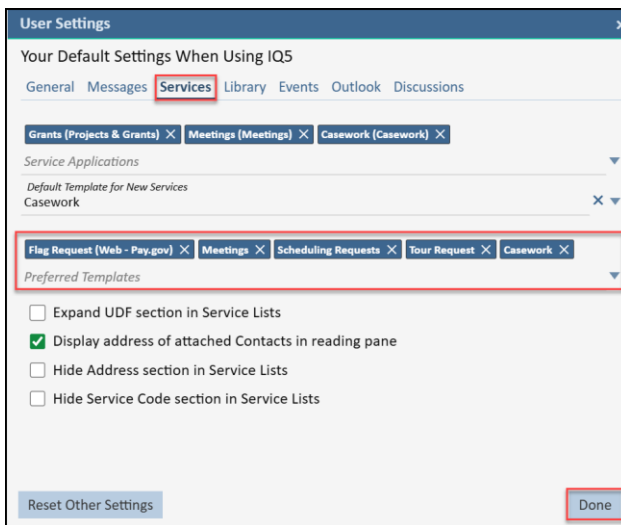
- Response Required:** If the constituent wants a follow-up call, email, etc. choose response required. Make sure you have designated the **Method Out** and **Assigned** the call to the correct staffer first.
- No Response:** If the constituent called to just give an opinion and needs no follow up, choose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

Creating a New Service from the Log Call Screen

- 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 **Casework** 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.

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Create a Service Message/Note



1. Click on the Log Call icon
2. Click on **Create**.
3. Select **Service Message**.

Create:

Message ▼

Message

Service Message

4. Type in the comments as usual.
5. Search for the constituent calling using the left column. Select the existing Contact record.
6. A list of Open and Closed Services for the Contact appear. Select the Service they are calling about.
7. Choose whether the call will be logged as Note that will appear in the Service, or as an Open Message that will need to be responded to by the owner of that Service.

Log Call

Search by Nameline, Email or Phone
coleman quorum

Prefix	First Name	Middle Name	Last Name
	Coleman		Quorum

Address City State Zip

Email Type Cell Phone Phone

Title Organization

☐ Create a New Contact

Contact Search Results

☒ Quorum, Dr. Coleman 12134 Monument Dr., Fairfax, VA 22033-5531, VA11 jonathan.kilgore-2@leidos.com, (123) 456-7890 (C) Newsletter Subscriber; Veteran - Thank them for their service	ID: 7184799 Messages Open: 1 Closed: 1 Services Open: 2 Closed: 0
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Comments
Calling to update about their existing casework.

Create:

Service Message ▼

☒ **Open Casework**
U.S. Social Security Administration
Created on 6/4/2026 - 11:16 AM

☐ **Open Casework**
Created on 6/9/2026 - 07:47 AM

☒ Note ☐ Message

Duplicate Check Add Service Note Cancel

8. Click **Add Service Note/Service Message** depending on your choice.