

## Course Summary

**Course Duration**

90 min

**Audience**

Congressional District Office  
Team or IQ users who manage  
Casework services

**Method of Training**

WebEx/remote

**Market**

House, Senate

**Customer Service**

US Senate email:  
[helpdesk\\_iq@scc.senate.gov](mailto:helpdesk_iq@scc.senate.gov)

General Support Email:  
[support@IQservicedesk.com](mailto:support@IQservicedesk.com)  
Live Chat support available  
within IQ  
703-206-0188  
Monday –Friday  
7 AM to 7 PM (EST)

*\*Extended Hours vary by  
contract.*

**Website**

[www.intranetquorum.com](http://www.intranetquorum.com)

**Document Revision Date:**

December 2020

## Training Agenda

### Course: Managing Casework Services in IQ

Pre-requisite: New users of the IQ Tool are recommended to take the *Introduction to IQ* course prior to attending this course.

This content of this course is focused on casework activities associated with the *Services* module of the IQ Tool.

#### 1 Introduction

Course Overview  
What is an IQ Service?  
Service Account Preferences  
Homepage Setup for Caseworkers

#### 2 IQ Service Records

Creating a Casework Service Record  
Understanding Casework Record Details  
Creating Contacts for Services  
Managing Messages for Services  
Closing a Service

#### 3 Form Letters

Creating and Managing Form Letters for Services

#### 4 Searching for a Service

Conducting Basic and Advanced Searches  
Creating Custom Quick Searches & Favorites  
Searching/Working with Service Related Messages

#### 5 Parent/Child Designation

Attaching existing Services

#### 6 Reports

Generating Quick Service Report

#### 7 Wrap Up

Best Practices