

How to Use Form Letters and Set Response Rules to Respond to Bill Messages

Market: House, Senate

Module: LegiStats*

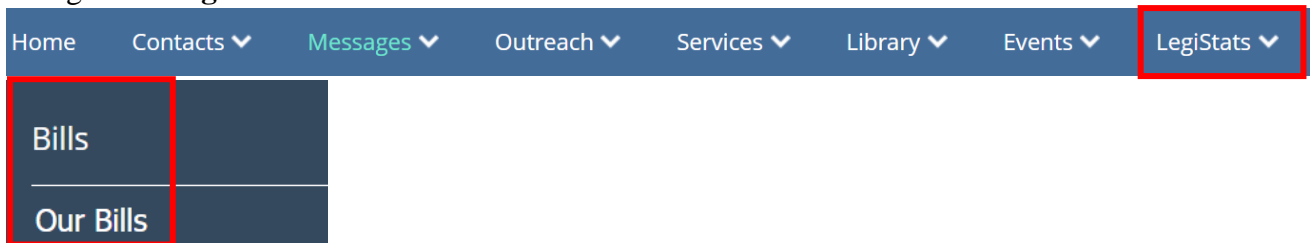
Purpose: This guide provides instruction on how to create and assign a Form Letter, which is used to respond to a bill position (support the bill, opposes the bill, undecided about the bill).

* This is a new feature in IQ that supports the management of bill-related messages. A current best practice is to use the *LegiStats* module as the starting point until future enhancements with the *Messages* module.

Key Benefits

IQ has the capability to identify messages that refer to a congressional bill and automatically sorts these messages into the appropriate bill record and bill positions. By creating and assigning a Form Letter to respond to each bill position, you can respond to volumes of messages using the appropriate bill-position responses. By applying rules to bill-related messages, any future messages associated with the bill and its position can be processed automatically.

1. Navigate to **LegiStats > Bills > Our Bills** .



2. The results display a list of bills introduced to Congress that is specific to your office. On the selected bill record, select the position to generate a Form Letter. For this example, select **+Letter for Bill Supporters** to create and save the Form Letter that will be used to respond to messages of the bill supporters.



- The Form Letter window opens. IQ automatically incorporates the name of the Bill and the position selected into the name of the Form Letter. Select the template and directory and select **Add**.

- Complete the process of creating a Form Letter. For instructions, refer to the *How to Create a Form Letter* Quick Reference Guide.
- Go back to the bill record. Now that you have a Form Letter to use, you can include it with the response rules for the bill position. Click **Assign Response**.

6. Complete the appropriate fields for the Bill Response window.

Assign Bill Related Response HR.1721.116

99 open messages and all future messages related to this bill will have these settings applied.

Constituents Position Supports the legislation (0 open) Opposes the legislation (0 open) Position undetermined (99 open)

Comments

Update if empty Remove Existing Add to existing

Issues +

Assigned To

Letter Name

Batch Change No Change All Active Unlocked My Active Unlocked Add New Remove Current

Batch Name

- a. **Position:** select the position that is associated with the Form Letter.
- b. **Comments:** If appropriate, add any comments about the campaign response:
 - **Update if Empty:** Check this box to add additional comments.
 - **Remove Existing:** Check this box to remove existing comments.
 - **Add to Existing:** If there are comments, check this box and then type your new comments. This will add your new comments to the existing comments.
- c. **Issues:** If appropriate, assign the issue code(s) to the campaign. These issue code(s) will then be automatically tied to messages currently in the campaign and all future messages that come into the campaign.
- d. **Assigned To:** Select a name of the person who is assigned to handle the campaign.

NOTE: If your office has assigned a staff to handle messages tied to an issue code, their names will automatically appear in this field.
- e. **Letter Name:** Select the Form Letter that you just created for this bill position.
- f. **Batch Change:** IQ will automatically default to **Add New**.
- g. **Batch Name.** This will automatically be populated with the title of the Form Letter selected. A best practice is to use this name so that the batch and Form Letter and the bill position are consistent.

7. Select **Save**.

8. Repeat these steps for the other bill positions.

The illustration below provides best practices on managing messages from a macro and micro level approach in IQ.

First, manage bill-related messages as this will allow you to also manage all the campaigns associated with a bill. Thus, you are reducing the number of campaign messages (which tend to have the highest volume of message records in IQ) at the same time.

Second, manage campaign messages by combining those that are similar in nature. Thus, you are reducing the number of campaigns to manage and to respond.

Finally, manage individual messages as these are the type of messages that have a lower volume of records in IQ.

