

How to Create and Process a Casework Record

Market: Federal/State/Local, House, Senate

Modules: Service, Contacts

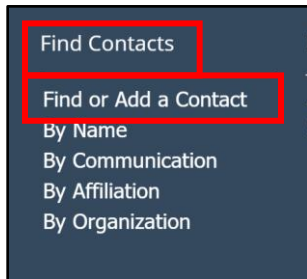
Purpose: This guide provides instruction on how create and process a Casework Record that is requested by an individual whose contact record is currently stored in IQ.

If the individual requesting the service is currently not stored in IQ, create a Casework Record using the steps described in the *How to Create a Service Record Quick Reference Guide* as a starting point.

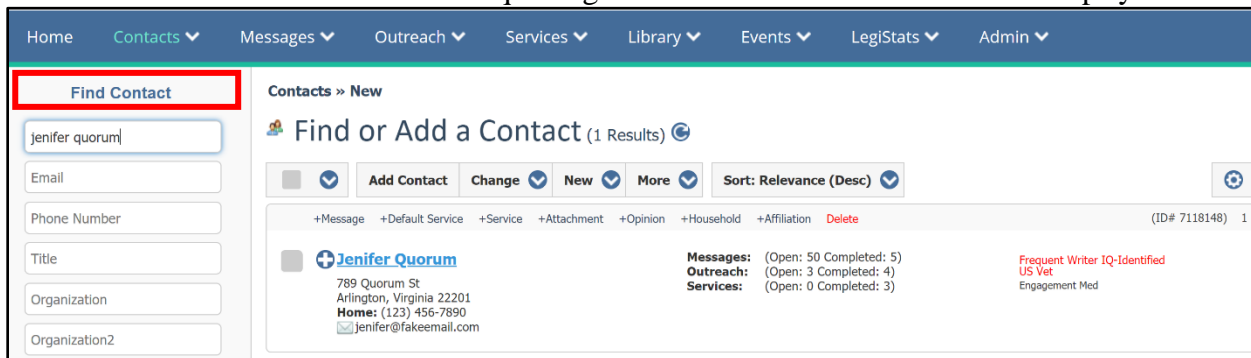
Key Benefits

IQ provides the capability to create a casework record using a customized template specific for this service. As with other service records in IQ, it assumes the same characteristics such as the ability to route it to other users, create alerts to monitor the progress, add contacts to the record, etc.

1. Navigate to **Contacts > Find Contacts > Find or Add a Contact.**



2. Search the record of the constituent requesting the Casework. Click the link that displays their name.



3. Select **Actions > New Service**.

Contacts » [New](#) » Contact ID# 7118148

Jenifer Quorum
Frequent Writer IQ-Identified, US Vet

Engagement: 45 Med

Actions

- New Default Service
- New Service**
- Attach Existing Event
- New Form Message
- New Custom Message
- New Opinion
- Duplicate Check
- Summary Report by Section
- Delete

General | Messages (55) | Outreach (7) | Services (3) | Events (2) | Voter Data | Log (7)

Home Address + *
789 Quorum St

Business Address +
None

Online Info +
jenifer@fakeemail.com *

Phone Number
H: (123) 456-

4. Select **Case work** from the options. Uncheck **Show Preferred Only** to view all of the office’s services, if needed.

Select Service Type

Show Preferred Only

Casework

- Commendations and Greetings
- Internship Request
- Military Academy Nominations

5. Complete the fields associated with the Casework Record.

Description:
[Text Input Field]

Opened: 2/15/2021 Alert: 2:39pm

Service Codes:
[Text Input Field]

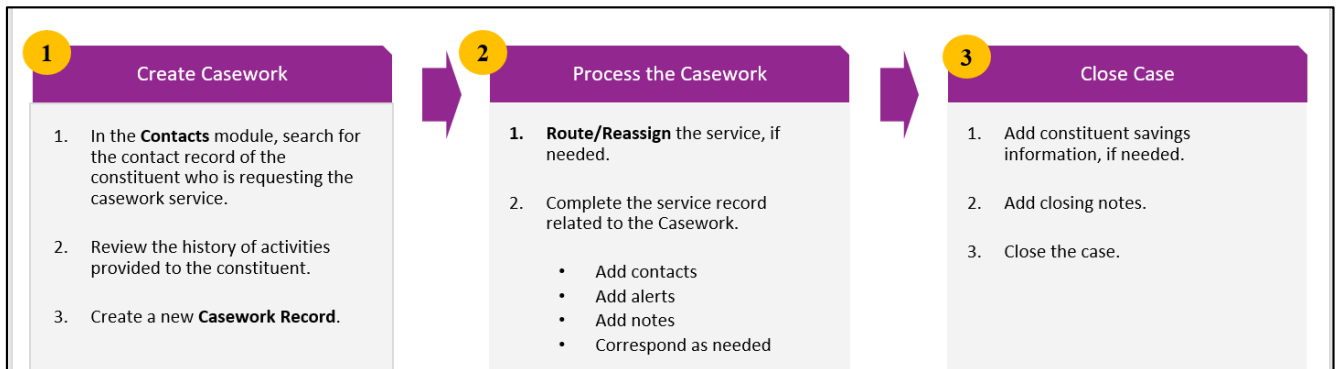
General Information

Case Status: [Text Input Field] + Last Contacted: [Text Input Field] Contact Method: [Dropdown Menu]

Case Information

6. Click **Save**.

Note: A Casework is a type of service in IQ. Thus, it shares the same characteristics as other services.



Please navigate to the [IQ Quick Reference Guide Page](#) and refer to the reference documents under **Service Module** for instructions on additional activities to process a casework.