

Course Agenda: Managing Casework Services

Course Summary

Course Duration

90 min

Audience

IQ users who manage an office's casework services.

Method of Training

WebEx/remote

Market

House, Senate

Customer Service

US Senate email:
helpdesk_iq@scc.senate.gov

General Support Email:
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

Document Revision Date:

December 2021

DESCRIPTON

Pre-requisite: New users of the IQ Tool are recommended to take the *Introduction to IQ4* course prior to attending this course.

This content of this course is focused on casework activities associated with the *Services* module of the IQ4 Tool.

OPTIONAL

To enhance the learning experience of this virtual training, participants may follow the instructions provided in the presentation by logging into their IQ account using an additional workstation.

Since the training session is a LIVE demonstration, please keep in mind that technical issues unrelated to the course may need to be addressed outside the session by an Office IQ Consultant.

1 Introduction

Overview of Casework-related tiles and preferences

2 IQ Casework Records

Creating a Casework Record

Working within a Casework Service

Managing Agency Contacts, Messaging, and the Activity Stream

Closing, Reopening, and Modifying a Casework

3 Searches

Conducting Basic and Advanced Searches

Using Service List Views and Filters

Saving Searches

4 Reports

Generating Reports

5 Wrap Up