How to Create and work a Case

Search and Create a New Case Service:

1. In the **Services** Big Menu, select **Contact** in the **New** column. (*IQ will open the Find or Add a Contact)*
2. Enter the *First and Last Name, Address, Email Address* and/or *Phone Number* of the person for whom you are adding a new Case Service. *(IQ will automatically search and display a list of possible matching Contacts)*
3. In the resulting list, determine if there is a matching Contact record and then follow either A or B:

    A. When a matching Contact record is displayed, click the **+Service** in-row action. Select the **Casework** Service type.
    OR
    B. When no matching Contact record is found, click the **Add Contact** button. Enter all of the contact's information (e.g. Prefix, Address, Phone Number and/or Email Address) and click the **Add & Open** button. (*IQ opens the new Contact record page*). Click the **Actions** button and select **New Service.** Then select the **Casework** Service type.

Add Casework Information:

1. Type a **Description** of the Case (e.g. Mr. Jones needs assistance with obtaining his Social Security check).
2. Select an **Alert** date to set a reminder to be notified about a case. (*Alert Dates can be searched, filtered and sorted).*
3. Select the appropriate Agency Code(s) (e.g. VA, SSA, USCIS, etc.) in the **Service Codes** field. (*Codes are used for categorizing, reporting and agency liaison associations.*)
4. Enter any other pertinent information into the **Case Status**, **SS#**, **Case Number**, **Resolution**, **Success Story**, **Monetary Value**, etc. fields. (*The additional fields are used for searching, and report analytics*).
5. Click the **Save** button at the bottom of the window.

How to Attach a File:

1. Click the **Paperclip** icon in the **Attachments** field.
2. Drag and drop your file into the window or click on the "*Drag and drop files here, or click for the option to browse for file*" to open the Window's file selection dialog. Select all files to be attached, and click the **Open** button. (*The selected files will appear in the **Attach File** dialog with a delete icon next to each*).
3. Type any comments about the file(s) in the **Note** field and click **Attach**. (*In the Activity section, IQ displays the attach file names, notes and detailed information about the attachment - date/time/user information*).

How to Attach an Agency or Other Contact:

1. Click the **+** icon next to **Other Contacts** in the Detail section.
2. Type the First and Last Name (*IQ displays a drop-down list of possible matches*). If the person exists, then select the person and click the **Attach** button.

OR
If you need to add a new contact, click the **Add Contact** link. (*IQ displays the Attach New Other Contact for Service dialog).* Enter in all of the contact's information (e.g. Prefix, Address, Phone Number and/or Email Address) and if adding a new Agency Contact, select the *Business* and *Agency* checkboxes at the top of the window to enter the appropriate information. Click the **Attach & Exit** button.

Add a Case Note:

1. In the Activity section, type your notes in the Add a note… field.
2. Click the **Post** button to save. (*There is a 4,000 character limit per note and IQ displays a character counter. If you exceed 4000 characters, you will not be able to save your Note until you remove the excess characters.*)

Log a Phone Call:

1. In the Activity section, click on the **Phone** icon.
2. In the **Contact** field, type the constituent's name, agency contact's name or anyone else associated with the Case Service record. Select the person and click the **Attach** button.
3. In the **Call Type** field, select either *Incoming* or *Outgoing*.
4. In the Add a Note… text field, enter the appropriate information about the phone call.
5. Click the **Save** button. (*In the Activity section, the phone call information will be detailed and included in Message Analytics and Reports*).

How to Send a Form Letter to the Primary or Other Contacts:

1. Click the **Envelope** icon next to the person's name in the **Primary** or **Other Contacts** column.
2. In the Message record, populate the fields, such as Outgoing Method, Issues, Assigned To, and Salutation, as needed.
3. In the **Form Letter** field, type the "*Form Letter Name*" or search for the desired Form Letter. (*The salutation and contents of the selected form letter will be displayed below the Attachments field*).
4. Enter values for any Fill-In fields that appear for the letter.
5. Click in the **Status** field and select *Approved* (if needed).
6. Click the **Send** button if the Outgoing method is email or the **Print** button/**Print Final** if the method is US Mail. (Note: This action changes the status of the Message record to *Completed*).
7. Click the **Service** breadcrumb at the top of the Message record to return back to the Case Service record.

How to Send a Customized Response to the Primary or Other Contacts:

1. Click the **Envelope** icon next to the person's name in the **Primary** or **Other Contacts** column.
2. In the Message record, populate the fields, such as Outgoing Method, Issues, Assigned To, and Salutation, as needed.
3. Click the **Customized** button.
4. Type the contents of the customized letter in the Content editor and click the **Save** button.
5. Click in the **Status** field and select *Approved*.
6. Click the **Send** button if the Outgoing method is email or the **Print** button/**Print Final** if the method is US Mail. (Note: This action changes the status of the Message record to *Completed*).
7. Click the **Service** breadcrumb at the top of the Message record to return back to the Case Service record.

How to Complete a Case:

1. On the Casework Service General Tab, click the **Pencil** icon next to **Status: Open** in the Detail section.
2. In the **Route Service** dialog, the **Available Routes** will default to Completed, if this is the last or only step in the Case Service record.
3. Type an optional note in the **Closing Note** field.
4. Select the appropriate **Closed Status Code** (e.g. Closed, Closed Favorably, etc.).
5. Click the **Close Service** button.