

## How to Monitor Service Alerts

**Market:** Federal/State/Local, House, Senate

**Module:** Services

**Purpose:** This guide provides instructions on how to set alerts to help monitor the progress of a service in IQ.

### Key Benefits

Monitors are useful if you are responsible for managing the flow of work of other IQ users. You can use the **Monitor** option to stay current on the progress of a service that is assigned to others. You will receive alerts from your Monitored services in your Outlook Inbox (if IQ is integrated with Outlook) and in your IQ Alerts. Please check with your IQ Consultant on Outlook integration.

1. Open an active service record.
2. In the Activity section, click the monitor icon.

The screenshot shows the IQ system interface for a service record. The breadcrumb trail is 'Services > Results > Service'. The service title is 'OPEN Casework - SOCIAL SECURITY ADM for Mr. John Quorum' with ID# 800968. The 'Activity' tab is selected, and a red box highlights the 'Monitor' icon in the activity toolbar. The interface includes sections for 'Detail', 'Activity', and 'Discussion'. The 'Detail' section shows the status as 'OPEN', assigned to 'Profile Caseworker', and opened on 2/10/2021. The 'Activity' section shows a note from 'Profile Caseworker' with the subject 'Approved E-Mail to Mr. John Quorum training@iqhelpdesk.com' dated 2/23/2021 at 2:54pm. The 'Discussion' section shows a process case begun on 2/10/2021 at 3:18pm.

3. A new window appears.

### Option- Adding a Monitor

- a. Click **Add Monitor** tab.

The screenshot shows the 'Edit Service Monitor' interface. At the top, there are two tabs: 'Add Monitor' (which is highlighted in blue) and 'Remove Monitor'. Below the tabs, there are several form fields: a checked checkbox for 'Alert on Status Change', radio buttons for 'Until Service is Complete' (selected) and 'Until Current Step is Complete', a 'User' dropdown menu with 'Profile Caseworker' selected, a 'Group' dropdown menu, and a large text area for 'Alert Text'. At the bottom right, there are 'Add' and 'Close' buttons.

- b. Complete the information.
- c. Click **Add**.

### Option - Removing a Service Monitor

- a. Click the **Remove Monitor** tab.

The screenshot shows the 'Edit Service Monitor' interface with the 'Remove Monitor' tab selected. The 'Add Monitor' tab is now greyed out. The main content area displays the message: 'You can only view or remove yourself and groups to which you belong.' Below this message are 'Remove' and 'Close' buttons.

- b. Click **Remove**.
- c. Click **Close**.