

How to Close a Service Record

Market: Federal/State/Local, House, Senate

Module: Services

Purpose: This guide provides instruction on how to close a single-step service record or the last step in a multi-step

service record in IQ.

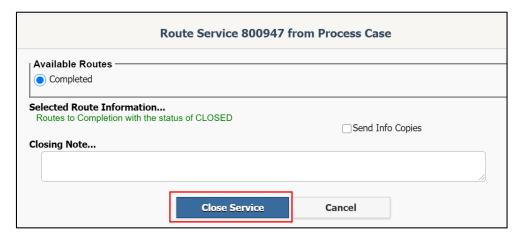
Key Benefits

Properly closing a service record in IQ helps inform office staff on the correct statuses of their service records.

- 1. Open an active service record.
- 2. Complete all the required fields.
- 3. Click the pencil icon next to **Open.**



4. The routing window appears on the screen. Enter the closing notes.



5. Click **Close Service**. The service record displays a *Closed* status.

