

How to Route Form Letters for Approval

Market: Federal/State/Local, House, Senate

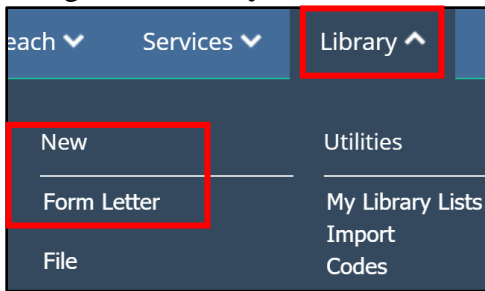
Module: Library, Messages, Home

Purpose: This guide provides instruction on routing Form Letters for approval in IQ.

Key Benefits

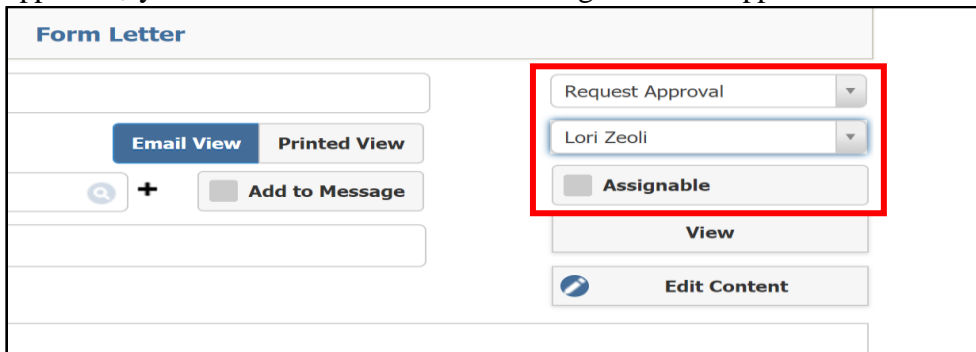
Form Letters are customizable letters that you can use/reuse to respond to volume of messages that are similar in nature; thus, reducing the need to create a new response to individual messages that are similar in nature. When created, these Form Letters can be sent for approval from one or more IQ users in your office, ensuring the quality of the Form Letter. The same process can be applied to Messages being sent to constituents.

1. Navigate to Library > New > Form Letter.

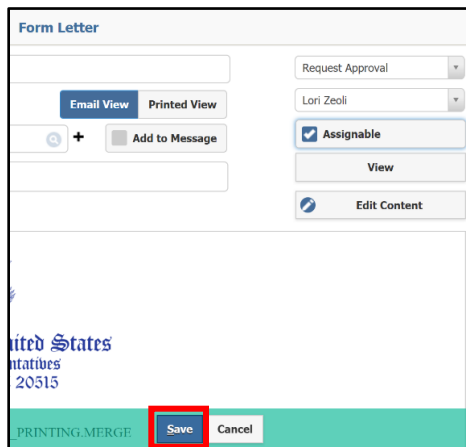


2. Follow the steps for creating a New Form Letter found in the *Create a New Form Letter Quick Reference Guide*.

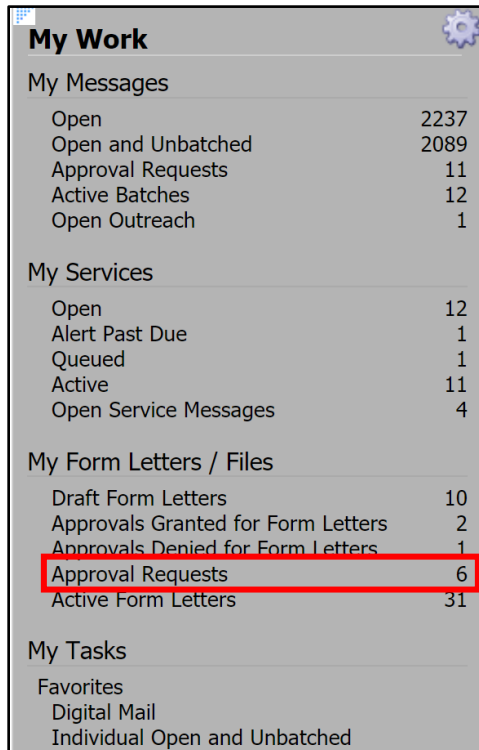
3. Change the Status of the Form Letter from Draft to Request Approval. Then select your Form Letter Approver. Check the Assignable box after choosing your approver. This will ensure you can assign the Form Letter to messages, campaigns, and bills while awaiting approval. Once the Form Letter is approved, you will be able to send the message with the approved Form Letter.



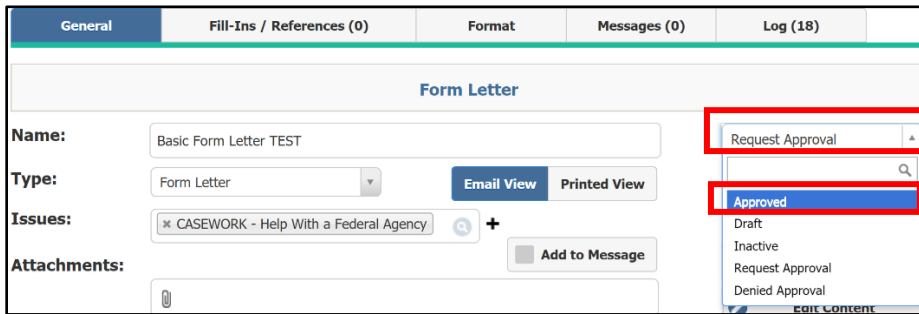
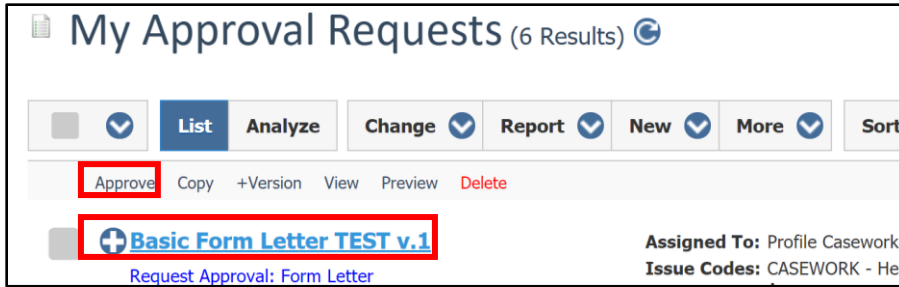
4. Click **Save**.



5. The Approval request can now be seen from the Approvers Home Page if they have the **My Work Summary** tile.



6. Select your Approval Requests to view and approve the Form Letters or Request approval from the next user in your office if necessary.



7. When a Form Letter is Approved or Denied you can see it from your My Work Summary Home page tile as well as from the Library module.

Figure 1: Home Tile

My Work	
My Messages	
Open	2237
Open and Unbatched	2089
Approval Requests	11
Active Batches	12
Open Outreach	1
My Services	
Open	12
Alert Past Due	1
Queued	1
Active	11
Open Service Messages	4
My Form Letters / Files	
Draft Form Letters	10
Approvals Granted for Form Letters	2
Approvals Denied for Form Letters	1
Approval Requests	6
Active Form Letters	31
My Tasks	
Favorites	
Digital Mail	
Individual Open and Unbatched	

Figure 2: Library Module

Find Form Letters
My Active Form Letters
My Form Letters
My Drafts
My Approval Requests
My Approvals Denied
My Approvals Granted
My Recently Used

- To request approval for a Message record, change the status from **On Hold** to **Request Approval**. Your approver will be able to access these request from their My Work Summary Home Page tile.

Messages > Results > Message

Request Approval Message for [Jenifer Quorum](#)

1234567890 (H)
 Newsletter Subscriber
 Frequent Writer IQ-Identified
 US Vet

General Log (15)

Message

Outgoing: E-Mail

From: "Congressman John Quorum" <iq.training@training.lmhostediq.com>

Status: Request Approval

By: Any Form Letter Appr...

My Work

My Messages

Open	2237
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Active Batches	12
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My Services

Open	12
Alert Past Due	1
Queued	1
Active	11
Open Service Messages	4

My Form Letters / Files

Draft Form Letters	10
Approvals Granted for Form Letters	2
Approvals Denied for Form Letters	1
Approval Requests	6
Active Form Letters	31

My Tasks

- Favorites
- Digital Mail
- Individual Open and Unbatched

9. Select the message individually to approve or select several at once and approve them by selecting **Change, Data, Change Status, Change all Selected Mail to Approved.**

My Approval Requests Messages (11 Results)

List Analyze Map Change Send Print Report More Sort: Date In / Date Created

Change Edit Contact Color No Response **Approve Denied Approval** Forward +Affiliation +Service Swap Contact View Reports

Recent Activity Delete

+E-Mail Scott Logan (High) Status: Request Approval

Messages » Results

My Approval Requests Messages (11 of 11 Records Selected)

List Analyze Map **Change** Send Print Report More

Tag Data **Contact Data** Color Affiliation Duplicates Status Delete Add to Service Add Discussion

Change Edit Contact Color No Response Forward +Affiliation +Service Swap Contact

Recent Activity Delete

+E-Mail

Date In: 2/2/2021
Modified: 3/29/2021 - 12:18pm
Issue: JUD - Judiciary, CASEW
Subject: Please stand for justice
Comments: ✎

ogan (High)
 ing@iqservicedesk.com
 of Legislation and Regulatory Affairs
 partment of Health and Human Services
 tration for Children and Families
 treet SW, Floor 5
 Washington, D.C. 20201-0001 DC01
Business: (202) 401-4529

Change Data

11 of 11 individual messages may be changed.

Comments

Update if empty Remove Existing Add to existing

Issues

Make no status updates
 Change all selected mail to On Hold
Change all selected mail to Approved
 Change all selected mail to Denied Approval

Related Bill

Assigned To

Outgoing Method

Letter Name

Batch Change

Change Status

Make no status updates

Next Action Save DupCheck Send Email Print Draft Preview Final Copy Label Envelope

Save Cancel Advanced Options