

## How to Add and Use the *Quick Intake* Feature of the *Task Tile*

**Market:** House, Senate

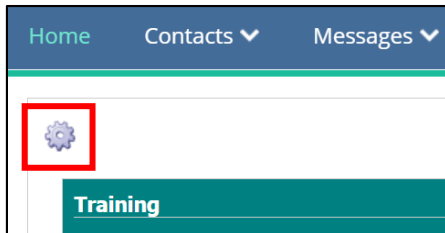
**Module:** Home

**Purpose:** This guide provides instruction on how to add and use *Task Tile* on the IQ Home Module and configure it specifically for the *Quick Intake* option.

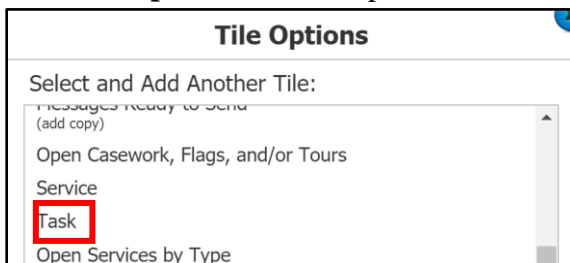
### Key Benefits

This tile enables you to use the *Quick Intake* option that allows you to immediately create and save a record in IQ that is associated with particular task (e.g., meeting, casework, opinion, tour). Thus, you can access the record at a later time to add more information. This *Quick Intake* feature is designed for new office staff so they can quickly process these tasks during their first day or week in their congressional office. The availability of this feature may vary based on offices. Contact your IQ Consultant for this feature as needed.

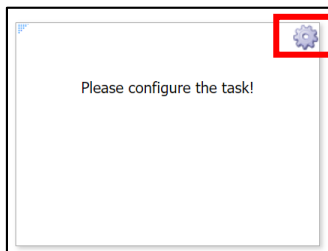
1. Navigate to the **Home** module.
2. Click the **Gear** icon in the upper left hand corner of your homepage.



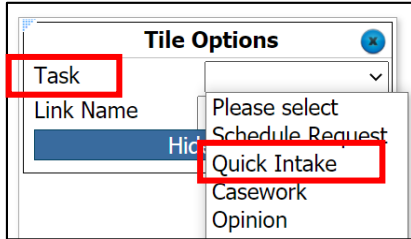
3. The **Tile Options** window opens. Scroll to the list and select **Task**.



4. The **Task Tile** has been added to the bottom of the Home page. It is ready for customization. Click the **Gear** icon.



- Configure the tile by selecting the type of task. In this example, select **Quick Intake** for the **Task** field.



Types of Tasks:

- Schedule Request*: shortcut to processing a meeting request record
- Casework*: shortcut to processing a casework service record
- Opinion*: shortcut to processing an opinion record
- Tour Requests*: shortcut to processing a tour request record
- Quick Intake*: shortcut to processing all the above categories

- The type of task you selected will be displayed as an icon for this tile. In the example, selecting the **Quick Intake** option displays the *Quick Intake* icon.



- Search for or create a new contact record.

Quick Intake

Constituent Information

Select record or click Create New

Name (Mr. Joe T. Quorum Jr.)

Address

City

State

Zip

Phone Number

Email Address

**Lisa Simpson**

742 Evergreen Terrace  
Springfield, Virginia 22150  
7032118945

ID# 7118132  
(3 services)

+ CREATE NEW

8. Select the type of task to complete.

Opinion Case Schedule Tour

**Option 1-Opinion:** Task to create an *Opinion* record.

Details

Issue areas  
Enter value

Would you like to receive our newsletter?

Try to find out if they are active duty military, veterans, first responders, educators, etc.

Other Affiliations  
Enter value

Close with no response

Leave open for review and possible response

- a) *Issue Areas*: select an Issue Code or Issue Codes related to the opinion record.
- b) *Newsletter*: check the box if the constituent would like to subscribe to your office newsletter.
- c) *Affiliation Code*: select affiliation code(s) associated with the constituent.
- d) *Close with no response*: select this option if the constituent does not require a follow-up response from your office.
- e) *Leave Open for Review and Possible Response*: select this option if the record requires a review and follow-up response.

**Option 2- Case:** Task to create a *Casework* record.


Casework Description

Explanation of Problem (as received) \*

Agency Involved  
Enter value

- a) *Casework description*: enter the details regarding the casework request.
- b) *Agency involved*: select the name of the agency required to process the casework request.

**Option 3- Schedule:** Task to create a *Meeting Request* record.

Type of Request Enter value
Location Enter value
Event Date mm/dd/yyyy 
Event Time
Member Requested Enter value
Speaking Role Enter value
Additional Information

a) Complete the meeting-related fields.

**Option 4-Tour:** Task to create a *Tour Request* record.

Number in Party
Dates Available for Tour
ADDITIONAL INFORMATION

a) Complete the meeting-related fields.

**9. Click Submit.**