Digital Privacy Release Forms in IQ

Market: House
Module: Services
Purpose: This guide provides instruction on how to find and work Casework created by Digital Privacy Release Forms in IQ.
Key Benefits
For House customers, you have the option of utilizing a Digital Privacy Release form for your office! This form allows constituents to fill out and all of the information needed for your office to act on their behalf for an agency. Knowing how to find and work Casework created from these Digital Privacy Release Forms will enable your office to take advantage of this time saving feature.

1. Navigate **Services > All Open By Type > Casework from Privacy Release**.

2. The **All Open Casework from Privacy Release Services** list is displayed. Change your **Sort** field to **Sort: Opened (Desc)** to view your most recently opened Casework from Privacy Release Forms

3. Select the record you wish to view. **Acquire** the Service. Click **Edit**.

4. Add the **Service Code** for the Case in addition to the *Digital* service code that is already there. The Service code should match up with the Agency involved for the Case. Click **Save** at the bottom of the screen.

5. Review the **Attachments** section to find the PDF of the Digital Privacy Release Form (note that this form can be sent to Agency contacts for the case). Click on the **Case Information** and **Digital Privacy Release** tabs to review the information gained by the Digital Privacy Release Form

6. Work the Case as you would a regular Casework.