

Course Summary

**Course Instructor**

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**Course Duration**

90 min

**Resources**

[IQ Training Calendar](#)  
[IQ Support Center](#)

## Training Agenda

### Course: Managing Casework Services in IQ

This content of this course is focused on casework activities associated with the *Services* module of the IQ Tool.

#### 1 Introduction

Course Overview  
Homepage Setup for Caseworkers  
Account Preferences

#### 2 IQ Casework Records

Creating a Casework Service Record  
Understanding Casework Record Details  
Agency Contacts & the Activity Stream  
Messaging in a Casework  
Closing a Casework

#### 3 Searching for a Service

Conducting Basic and Advanced Searches  
Creating Custom Quick Searches & Favorites  
Searching/Working with Service Related Messages

#### 4 Form Letters

Creating and Managing Form Letters for Services

#### 5 Reports

Generating Quick Service Report

#### 6 Wrap Up

Best Practices