

Course Agenda: Managing Casework Services in IQ

Course Summary

Course Duration

90 min

Audience

IQ users who manage an office’s casework services.

Method of Training

WebEx/remote

Market

House, Senate

Customer Service

US Senate email:
helpdesk_iq@scs.senate.gov

General Support Email:

support@IOservicesdesk.com

Live Chat support available within IQ

703-206-0188

Monday –Friday

7 AM to 7 PM (EST)

**Extended Hours vary by contract.*

Website

www.intranetquorum.com

Document Revision Date:

March 2021

DESCRIPTON

Pre-requisite: New users of the IQ Tool are recommended to take the *Introduction to IQ* course prior to attending this course.

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

OPTIONAL

To enhance the learning experience of this virtual training, participants may follow the instructions provided in the presentation by logging into their IQ account using an additional workstation.

Since the training session is a LIVE demonstration, please keep in mind that technical issues unrelated to the course may need to be addressed outside the session by an Office IQ Consultant.

1 Introduction

Homepage Setup and Account Preferences for Caseworkers

2 IQ Casework Records

Creating a Casework Service Record

Understanding Casework Record Details

Adding Agency Contacts & Managing the Activity Stream

Corresponding via Email within a Casework Record

Closing a Casework Record

3 Searching for a Service

Conducting Searches & Setting Favorite Links

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