

How to Close a Service Record

Market: Federal/State/Local, House, Senate

Module: Services

Purpose: This guide provides instruction on how to close a single-step service record or the last step in a multi-step service record in IQ.

Key Benefits

Properly closing a service record in IQ helps inform office staff on the correct statuses of their service records.

1. Open an active service record.
2. Complete all the required fields.
3. Click the pencil icon next to **Open**.

The screenshot shows a 'Detail' view of a service record. The status is 'OPEN' in green text, with a small pencil icon to its right. Below this, the assigned person is 'Lori Zeoli' with another pencil icon and a 'Release' button.

4. The routing window appears on the screen. Enter the closing notes.

The screenshot shows a routing window titled 'Route Service 800947 from Process Case'. Under 'Available Routes', 'Completed' is selected. Under 'Selected Route Information...', it says 'Routes to Completion with the status of CLOSED' and there is a 'Send Info Copies' checkbox. A text area for 'Closing Note...' is present. At the bottom, a blue 'Close Service' button is highlighted with a red box, next to a 'Cancel' button.

5. Click **Close Service**. The service record displays a *Closed* status.

The screenshot shows the service record detail view with the status updated to 'CLOSED' in red text. A pencil icon is still visible next to the status.