

Closing and Reopening a Service Record

Market: House, Senate

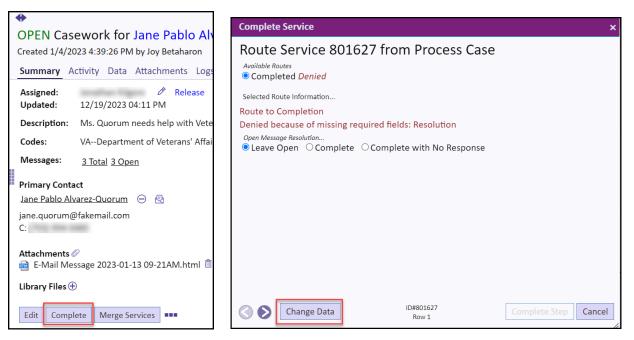
Description: These instructions teach users how to close a service record or reopen a closed service record in IQ.

Click the following link to be brought straight to the topic:

Finding and Reopening a Closed Service

Closing a Service Record

- **1.** Find the active service record assigned to you.
- 2. Select Complete.
- **3.** If additional information is needed before the Service can be closed you will be prevented from closing the Service and must click **Change Data** to add the missing information.



4. Complete the information in the **Complete Service** window. Click **Save**.

Complete Service		×
Route Service 801613 from Pr Available Routes © Completed Selected Route Information	ocess Case	
Route to Completion		
Send Info Copies		
Closing Note		
Closed Status Code		
	ID#801613 Row 5	Save Close

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Finding and Reopening a Closed Service

Note: You must have specific security permissions to reopen a closed Service. Talk to your IQ Consultant if you don't have permission and need it enabled.

- **1.** Search for your closed service record.
- 2. Select either in the detail record in the bottom left corner, or in the service name in the list view of your services.
- 3. Select Reopen.
- **4.** In the Reopen Service window, select **Reopen** \rightarrow **Save**.



