

Completing a Service Record

Market: House, Senate

Description: These instructions teach users how to complete a service template.

Click the following links to be brought straight to the following topics:

Attaching and Removing Contacts

Adding Attachments

Adding Notes

Logging Phone Calls

Creating Custom Alerts/Sending an Information Copy

Add/Remove a Monitor

Completing the Detail Page

As soon as you create a new Service, regardless of type, the user is redirected to the **Detail Page**, which is the template that is customized for that service.

- 1. In the **Summary** tab, enter in the details in the **Description** field for the Casework (or other service).
- 2. Click in the first box of the **Alert** field to select a date that you want to be Alerted on to follow up with this Service. Click in the second box to type in the time the Alert should occur.
 - a. **Note:** if you leave the time field blank, it will default to midnight on the date that you have chosen.
- **3.** Type in a **Service Code** to indicate which Federal Agencies (if any) are going to be involved in this Service.
 - a. Note: For a **Casework** service, you must have **at least one** service code in this field in order to complete the service. For other Services, such as a **Flag Request** there may be a unique service code that appears for you.

Edit Casework		×
Summary General Information Case Information Case Closure Information External Description Opened Date 12/20/2022 Time 01:34 PM Other Date 01/06/2023 Time 01:20 PM Service Codes	* •	Activity Discuss Add a note Post Process Case Begun 12/20/2022 - 01:34 PM
O ID#801615 Row 1		Save & Close Save Close

4. Continue to complete the information in the different tabs of the case: General Information, Case Information, Case Closure Information and External. Fill out the fields as you have the information. Remember these fields will change based on the Service chosen. You do not need to fill out all these fields at the time the Service is opened.

Edit Casework			
Summary General Informatio	Case Information	Case Closure Information	External

5. Click Save & Close or Save.

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- a. **Save and Close:** Saves the entered information and returns you to the previous screen you were on.
- b. **Save:** Saves the information entered without closing it. Allows you to save your work as you go.

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Attaching and Removing Contacts

- 1. If the Service was created from the Contact Record the **Primary Contact** field will have that Contact attached already. If the Service was created anywhere else, click the icon next to **Other Contacts**.
 - a. **Note:** There can only be **one** Primary contact for each service.
- 2. Use the Find or Find and Add tabs to search for Contacts in your database or create a new contact to attach to the Service. Click on the Agency Contacts tab to search your database for any Contact records that are tagged with the same Service code associated with your selected Service. Once found, select the Contact and click the Attach to Service button.

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ttaching as Other Contact	
Affiliations	Ð
Attach to Service	Cancel

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Adding Attachments

- 1. Click either the next to the Add Message button, or click the Inext to Attachments, and select Attach File.
- 2. In the Add Attachment window, enter the Note Text, if desired, and either:
 - a. Select a file to attach; or
 - b. Drag and drop the file into the text box.

Add Attachm	ent	×
Add Atta	chment	
Note Text		1.
Attachment		,
Select File	- or - Drop File(s) Here	
	I	D#801590 Save Close Row 1 Save Close

3. Click Save.

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4. Review your attached documents in the Attachments Tab at the top of the service.

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Adding Notes

1. Within the Open Service, click on the field directly under **Activity** and type in your **Note**, then click **Post**.

Activity Add Message	Discuss	E
Add a note		
I 🖻 🚺		Post

Logging Phone Calls

1. Click the *button* underneath the Note text area.

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- 2. Type in the name of the Contact that you are calling/have received a call from.
- 3. Select the Call Type, either Incoming or Outgoing.
- 4. Type the details of the call in the **Note** section.
- 5. Click Attach.

Log Call		×
<i>Contact</i> JANE QUORUM (ID:7183391)		
Call Type Incoming Outgoing Note		
Type details of call here.		
		<u>li</u>
\bigcirc \bigcirc	ID#801590 Row 1	Attach Close

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Creating Custom Alerts/Sending an Information Copy

- **1.** Click the *icon* underneath the Note text area.
- 2. Click into the User field to select the User(s) this will be sent to.
 - a. Note: If creating a Custom Alert choose yourself as one of the Users in this field.
- **3.** Click into the **Group** field if there is a Group of Users that will be receiving this Information Copy or Custom Alert.
- 4. If sending a Custom Alert check the Send Alert Later box.

Send Information Copy		×
User		
Group		
Include Distribution List in the Text of the	e Message? Send Alert	Later
Subject		
Message		<i>li</i>
S	ID#801590 Row 1	Save Close

- a. The **Send On** fields now appear. Click into the **Date** and **Time** fields to choose when and at what time the Alert will send.
- b. Type into Subject the name of the Alert. For Example, "Call Primary Contact today".
- c. Type into **Message** the details of the Alert. For Example, "Primary Contact has not been contacted in 30 days as of this alert. Call today with update."
- d. Click Save.

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Send Information Copy	×
User V	
Group	
Include Distribution List in the Text of the Message?	
Send On Date mm/dd/yyyy 🛱 Time: O	
Subject	_
Message	8
ID#801590 Row 1	

- 5. If sending an Information Copy type in a Subject line that will appear in the Users email.
 - a. Type into the **Message** field the body of text that will be sent to users.
 - b. Click Save.

Send Alert La	ter
1590	ave Close
	1590 Sa

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Add/Remove a Monitor

- **1.** Click the $\underbrace{\mathcal{O}}$ icon underneath the Note text area.
- 2. This opens the Edit Service Monitor dialogue. By default, it will start on the Add Monitor tab.
- **3.** Choose whether to **Alert** the monitor on Status Change and whether to Alert **Until Service is Complete** or **Until Current Step is Complete**.
- 4. Select the User(s) or Group(s) that will be Monitors for this Service.
- 5. Type into the Alert Text field what the Alert should say when sent to the Monitor(s).
- 6. Click Save.

Edit Service Monitor		×
Add Monitor Remove Monitor		
Alert on Status Change		
$ullet$ Until Service is Complete $ \odot$ Until Current St	tep is Complete	
Joy Betaharon X		
User		
Group		
Alert Text		
This case issue has been resolved.		
\odot	ID#801590 Row 1	Save Close

- 7. If Removing a Monitor click the Remove Monitor tab.
- **8.** Click the Mark to the User(s) or Group(s) you wish to remove as a monitor.
- 9. Click Save, if necessary. The window will automatically close if there is only one monitor.

Edit Service Monitor × Add Monitor Remove Monitor You can only view or remove yourself and groups to which you belong. Scope User Group Alert Alert Text SERVICE No This case issue has been resolved. Joy \boxtimes Betaharon ID#801590 Close \bigcirc Row 1

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