

Client Training HQ

Using the FN Case Request Feature

The **FN Case Request** feature (also known as “**webcapture**”) in Equifax[®] Immigration Case Management (ICM) is a customizable intake form that you may host on your website, allowing prospective clients to request a Consultation. When submitted, the FN record and Consultation Process are automatically created and an email notification is sent to the assigned Case Manager and Attorney.

Organizations may pick from a library of 23 standard database fields to include on their intake form as well as any of the 25 FN Custom Fields.

The below guide will walk you through enabling and configuring this intake solution.

Enabling the FN Case Request Feature

The FN Case Request feature must first be enabled for your ICM account. Contact Customer Support at ICMSupport@Equifax.com to request this feature. An email request template is provided below:

Hello ICM Support,

Please enable the **Allow FN Request cases** setting for our ICM account.

Please set the **Max Daily Limit** setting to **25**.

Our firm/organization name is: *Your Organization Name*

The **Max Daily Limit** setting is the maximum number of requests you would like to accept per day.

Configuring Administrative Settings

Once Customer Support has enabled the feature, you will then need to configure the related Administrative settings.

From **Firm Administration**, navigate to the **General** tab > **Consultation / Webcapture** sub-tab.

- **Default Responsible Attorney:** The default Attorney user to be assigned automatically to incoming case requests.
- **Default Case Manager:** The default Case Manager user to be assigned automatically to incoming case requests.
- **Default Success URL:** The webpage to display to prospective clients after they have successfully submitted their request.
- **Default Error URL:** The webpage to display to prospective clients if their request was not successfully submitted, for example if they did not fill out all required fields. Consider including a link back to the request form to try again, as well as contact information for further assistance.
- **Daily Count:** A display of the number of requests received so far on any given day.

For the default case assignment settings, many organizations choose to configure a “dummy” user so that the email notifications can be routed to a group email address. The assignment of a “dummy” user may also be helpful in workflow management of incoming requests (e.g., You can have a dashboard widget and/or report template filtered to show cases still assigned to the “dummy” user, indicating the request is still pending review and assignment to an appropriate staff member).

If you choose to create a “dummy” user for this purpose, feel free to contact Customer Support (or your Customer Success Manager) to request that the monthly user fee be waived for that user.

Creating your FN Case Request HTML Form

There is a **Sample FN Case Request HTML Code** (see next page) that you may use as a starting point in developing your form. Your webmaster should be involved in the review and implementation process.

You may copy-paste the below template into a text editor and save with an .HTML extension. It is recommended to open the resulting file with a program such as Notepad++ for better readability.

Sample FN Case Request HTML Code

```
<html>
<head>
<title>Example FN Case Request Form</title>
</head>
<body>

<!-- This example file shows the important parts in order for the FN Case Request to work properly. In the URL
below, replace the "ww#" with your server number (e.g., www, ww2, ww3, etc), and replace "YourFirmKey" with your
ICM account key. You may acquire this key from Customer Support, or by clicking "Update Info" in your Firm
Administration portal and referencing the second series of numbers in the URL (the 5-digit number) -->

<form id="FormName" action="https://ww#.welcomeclient.com/4DCGI/WEB_Create_FN_from_Webcapture/YourFirmKey/"
method="post" name="FormName">

Example FN Case Request Form<br /><br />

<!-- Required -->
First Name: *<br />
<input type="text" name="Field/14:5/Mixed" value="" size="30" maxlength="32" /><br /><br />

<!-- Required -->
Last Name: *<br />
<input type="text" name="Field/14:4/Mixed" value="" size="30" maxlength="50" /><br /><br />

<!-- Required -->
Email Address: *<br />
<input type="text" name="Field/14:25/Mixed" value="" size="50" maxlength="80" /><br /><br />

Gender:<br />
<input type="radio" name="Field/14:7" value="1" />Male<br />
<input type="radio" name="Field/14:7" value="2" />Female<br />
<input type="radio" name="Field/14:7" value="3" />Other<br /><br />

Home Phone:<br />
<input type="text" name="Web_Str_2" value="" size="12" maxlength="24" /><br /><br />

<!-- Uses custom FN field1 (see spreadsheet for other values for "name") -->
Example for using Custom FN fields:<br />
<input type="text" name="Field/14:137" value="" size="35" maxlength="80" /><br /><br />

<button type="submit" name="bSubmit" value="Submit">Submit</button><br /><br />

* Required Field<br />

</form>
</body>
</html>
```

Important Note on Form Translation and Button Customization: If you need to translate or customize the submit button text (e.g., change "Submit" to "Enviar" or "Envoyer"), do not modify the name="bSubmit" or value="Submit" attributes. The system backend strictly requires bSubmit=Submit to validate and process the request. Always use the <button> HTML tag as shown in the sample code. To change the button label displayed on your website, edit only the text between the <button> and </button> tags:

<!-- **English Default** --> <button type="submit" name="bSubmit" value="Submit">Submit</button>
<!-- **Spanish Example** --> <button type="submit" name="bSubmit" value="Submit">Enviar</button>

List of Available Fields

The below table provides the full list of available fields that may be used in your form, not including any custom questionnaires you may also incorporate.

Suggested Field Name	Maps to	HTML Tag	Type	Maxlength	Notes
Your Last Name	Personal Page - Last Name	Field/14:4/Mixed	Text	50	Required
Your First Name	Personal Page - First Name	Field/14:5/Mixed	Text	32	Required
Your Middle Name	Personal Page - Middle Name	Field/14:6/Mixed	Text	32	
Your Email Address	Personal Page - Primary Email	Field/14:25/Mixed	Text	80	Required
Gender	Personal Page - Gender	Field/14:7	Radio		Value = 1 - Male. Value = 2 - Female. Value = 3 - Other
Your Birth Date	Personal Page - Date of Birth	Field/14:16	Text	10	Must be mm/dd/yyyy format
Your Birth Country	Personal Page - Country of Birth	Field/14:18	Text	32	
Your Citizenship	Personal Page - Citizenship	Field/14:40	Text	30	
Marital Status	Personal Page - Marital Status	Field/14:15	Radio		Value = 1 - Single. Value = 2 - Married. Value = 3 - Divorced. Value = 4 - Widowed. Value = 5 - Separated. Value = 6 - Common-Law. Value = 7 - Engaged
Work Phone	Personal Page - Work Phone	Web_Str_1	Text	24	
Home Phone	Personal Page - Home Phone	Web_Str_2	Text	24	
Cell Phone	Personal Page - Cell Phone	Web_Str_5	Text	24	
Address Line 1	Personal Page - Address Line 1	ADD_Str_1	Text	80	
Address Line 2	Personal Page - Address Line 2	ADD_Str_2	Text	80	
Apt#	Personal Page - Apt#	ADD_Str_3	Text	32	
City	Personal Page - City	ADD_Str_4	Text	32	
State	Personal Page - State	ADD_Str_5	Text	32	

Suggested Field Name	Maps to	HTML Tag	Type	Maxlength	Notes
Postal Code	Personal Page - Zip Code	ADD_Str_6	Text	12	
Country	Personal Page - Country of Birth	ADD_Str_7	Text	32	
I94 Expiration	Travel Page - I94 Expiration	Web_Str_3	Text	10	Must be mm/dd/yy yy format
Current Immigration Status	Imm/Natl Page - Current Status	Field/14:44	Text	32	
Status Expiration	Imm/Natl Page - Status Expiration	Field/14:115	Text	10	Must be mm/dd/yy yy format
Briefly Describe Your Immigration Situation	OnDocs Case Note	Web_Txt_1	Textarea		
Your Custom Wording	FN Custom Field 1	Field/14:137	Text	80	
Your Custom Wording	FN Custom Field 2	Field/14:138	Text	80	
Your Custom Wording	FN Custom Field 3	Field/14:139	Text	80	
Your Custom Wording	FN Custom Field 4	Field/14:140	Text	80	
Your Custom Wording	FN Custom Field 5	Field/14:141	Text	80	
Your Custom Wording	FN Custom Field 6	Field/14:142	Text	80	
Your Custom Wording	FN Custom Field 7	Field/14:143	Text	80	
Your Custom Wording	FN Custom Field 8	Field/14:144	Text	80	
Your Custom Wording	FN Custom Field 9	Field/14:145	Text	80	
Your Custom Wording	FN Custom Field 10	Field/14:146	Text	80	
Your Custom Wording	FN Custom Field 11	Field/86:50	Text	80	
Your Custom Wording	FN Custom Field 12	Field/86:51	Text	80	
Your Custom Wording	FN Custom Field 13	Field/86:52	Text	80	
Your Custom Wording	FN Custom Field 14	Field/86:53	Text	80	
Your Custom Wording	FN Custom Field 15	Field/86:54	Text	80	
Your Custom Wording	FN Custom Field 16	Field/86:85	Text	80	
Your Custom Wording	FN Custom Field 17	Field/86:86	Text	80	
Your Custom Wording	FN Custom Field 18	Field/86:87	Text	80	

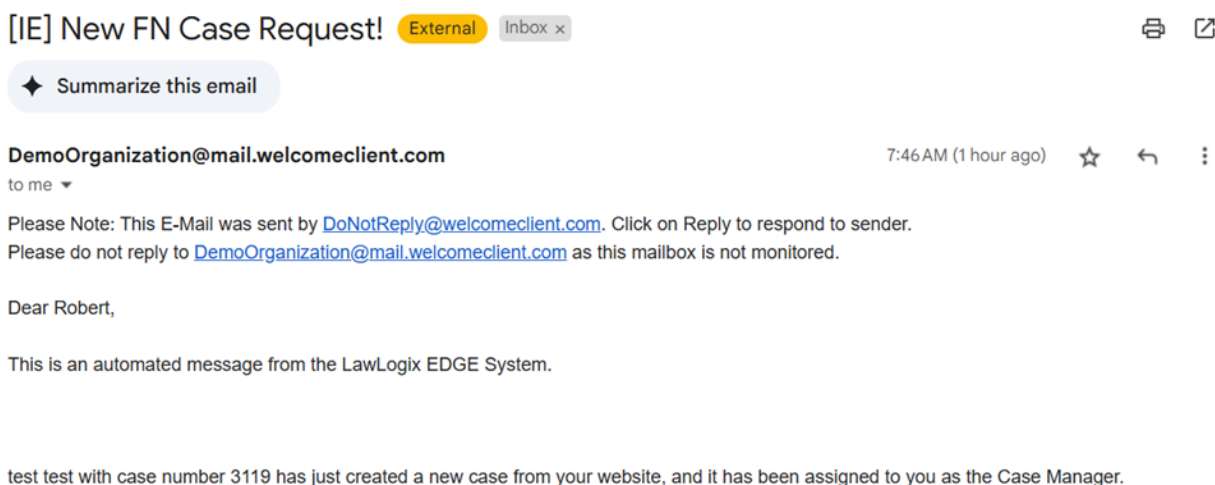
Suggested Field Name	Maps to	HTML Tag	Type	Maxlength	Notes
Your Custom Wording	FN Custom Field 19	Field/86:88	Text	80	
Your Custom Wording	FN Custom Field 20	Field/86:89	Text	80	
Your Custom Wording	FN Custom Field 21	Field/86:90	Text	80	
Your Custom Wording	FN Custom Field 22	Field/86:91	Text	80	
Your Custom Wording	FN Custom Field 23	Field/86:92	Text	80	
Your Custom Wording	FN Custom Field 24	Field/86:93	Text	80	
Your Custom Wording	FN Custom Field 25	Field/86:94	Text	80	

Testing your FN Case Request Form

After you have finished customizing your form, open the file in a web browser (make sure it has an .HTML extension) and submit a test request.

If successful, you will be routed to your **Success URL** (configured in the Firm Administration settings) and a **Consultation - Pending** Process will be created.

A notification email will also be sent to the assigned **Responsible Attorney** and **Case Manager**.



Consider implementing a Dashboard widget and/or Report template filtered to the **Consultation - Pending** Process type to help manage incoming requests.

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.