

Client Training HQ

Creating Customizable Foreign National (FN) Summary Templates

You can review relevant client and case data via the Foreign National (FN) Summary. The FN Summary template is customizable, and multiple templates can be created.

Creating an FN Summary Template

1. From the top Immigration Case Management (ICM) action bar, click **Tools**.
2. Click **Edit Document Templates**.
3. Select the **FN Summary Folder**.
4. Click **Add Document Editor Template**.
5. Use the editor tools to create your desired template.
6. Select from the available **Merge Tags** on the left to insert them into your template.
7. Consider leveraging the **Table** feature to organize your data for better readability.
8. You may edit the cells, rows and columns of your table to add border colors, background colors, and other style options.
9. Click **Save** to save the FN Summary template.
10. Now, click your **username** at top right, select **Personal Settings**, and under **Personal Preferences FN Search: FN Summary Template**, select the appropriate template from the drop-down menu.

Viewing an FN Summary

To open and view an FN Summary:

1. Search for the applicable FN by name.
2. In the search results under the **Summary** tab, click **View**. Or, alternatively, from an open **case file**, click **Review FN Summary**.

More Training Available!

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