Client Training HQ

Turbocharging Efficiency with HR Requests

The HR Request portal allows intake of new case requests from your HR users:

- Create fully customizable, Company-specific request templates.
- 100 custom questions/fields can be added to your custom fields library.
- Approximately 100 system fields are available (providing a library of 200 customizable questions).

How it Works

Once you log in to the HR portal, if you're an HR user, for whom the HR Request portal is active, you will see the **Request New Case** button at the top of the home page.

If you click the **Request New Case** button, you will be prompted to search for the employee, and then, you can either create a request for an existing employee or create a new employee.

Each Company may have their own unique template. HR users linked to multiple companies can select the Company, and the template will update to the correct version to be submitted.

> ***Note:*** The tab names and the content of each page are fully customizable.

When an HR Request is submitted, the following actions will automatically occur:

- The HR Request is listed on your Foreign National (FN) search screen and is available for reports.
- A complete summary e-mail notification is distributed to the assigned team for that Company. The e-mail provides full details on the submitted HR Request.
- All information collected (including information for custom questions) is loaded into the Employee/FN profile. Custom questions and responses are visible under the Financial/Miscellaneous tab.
- The employee and the petitioning Company are automatically linked.

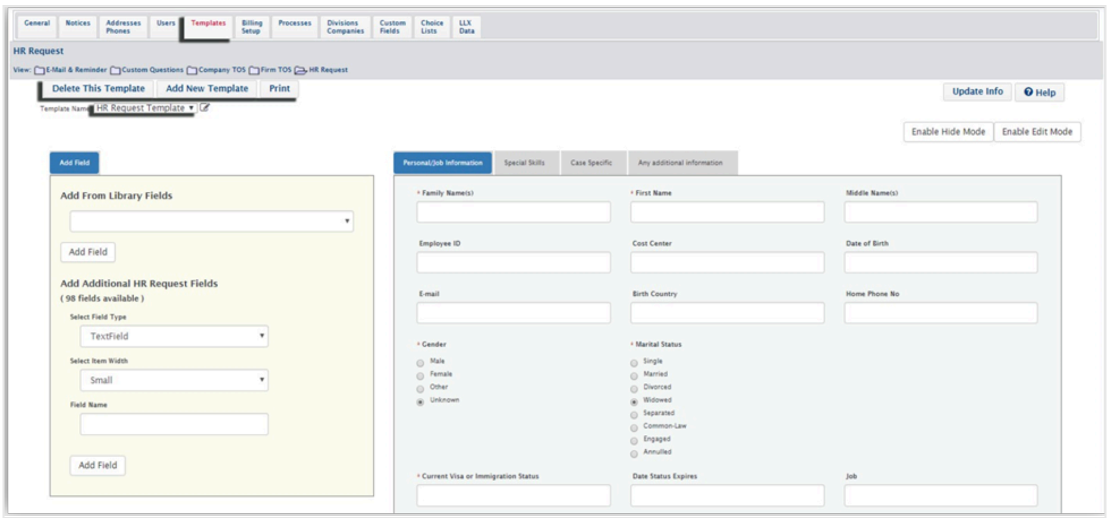
The HR Request Summary is displayed on the FN Search screen and contains all questions posed to HR and all responses received.

Images are examples and for information purposes only. They may vary across platforms and are subject to change.

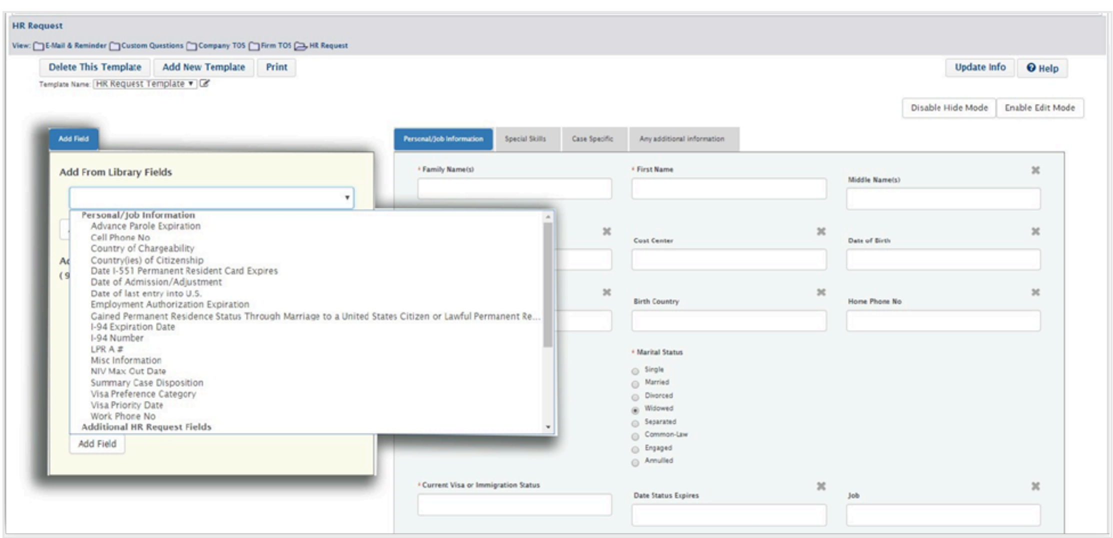
Managing Templates as an Administrator

Immigration Case Management (ICM) Administrators can create HR Request templates, which can then be assigned to Company profiles in ICM. This section provides an overview of the tools and options available for managing templates in the HR Request portal.

1. Create a new template from the default template (which contains about 100 system fields) or copy from a previously created and formatted template to save time. You can create as many templates as needed.



2. Click to expand the drop-down menu under the **Add From Library Fields** heading.
3. Select a field for inclusion on your template. As your Firm adds custom fields, they will be added to your library of fields.



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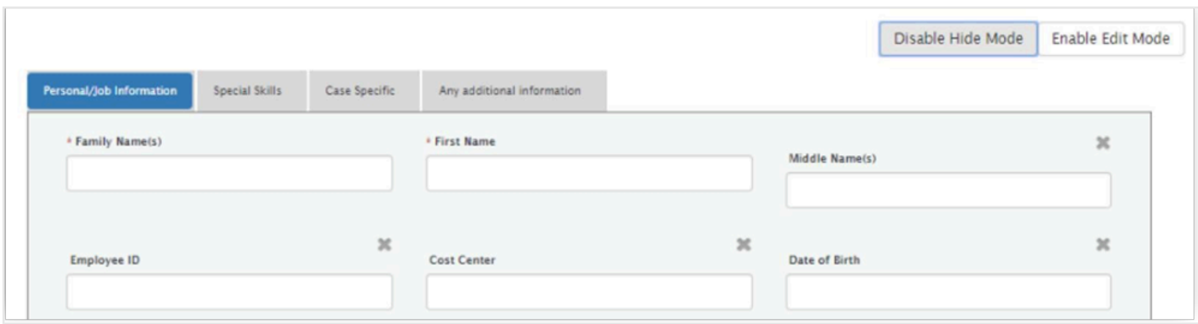
4. Complete the following customization options:
    a. Select **Field Type**.
    b. Select **item width**: Small, Medium, or Large.
    c. Create a **Field Name**.
    d. Enter the titles for the **allowed responses**.

5. Remove fields from the template, if needed:
    a. Click **Enable Hide Mode**.
    b. Click the "x" next to any field to remove it.

    Note: If a field does not display an "x", it cannot be removed.

    c. Click **Disable Hide Mode**.



6. Edit individual field properties including the question title and field size, if needed:
    a. Click **Enable Edit Mode**.
    b. Click the **pencil icon** to open the Field Editor.
    c. Edit information, as needed.
    d. Click **Update**.
    e. Click **Disable Edit Mode**.

7. Drag-and-drop fields into the desired position on the page.

    Note: Placement is dependent on the size of the field and the available space in the row.

8. Edit the tab name, if needed:
    a. Double-click the **tab name** to open the Tab Name Editor.
    b. Edit the tab name.
    c. Click **Update**.

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Activating the HR Request System for each Company

Activation of the HR Request portal for each Company requires an ICM Administrator to assign at least one contact and template to the Company:

1. Assign contact(s) who will be notified of new HR Requests:
    a. In the **HR Case Request/Default Case Manager** field drop-down list, click to select at least one user from the list to act as the case manager on the HR Request form and receive email notifications when new HR requests are submitted.

       Note: To select multiple users, hold down the **Shift** or **Ctrl** key while you click each user's name.

    b. Click the **Assign Users** button to save.

       Note: To remove a user, select their name from the **HR Case Request/Default Case Manager** list and click the **Revoke Users** button.

2. Assign template(s) to the Company:
    a. Click the **HR Request Template** drop-down menu.
    b. Select a template from your library of custom templates.
    c. Click **Update** to save your changes.

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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.