

Client Training HQ

Customizing the List of File Locations

If you have Immigration Case Management (ICM) Administrative privileges, you can customize your list of File Locations.

File Location settings can be used to track where the physical copy of a Foreign National's file is located. Settings can be used to indicate that the file is located in a specific section of the office, in offsite storage, or with a specific user.

To customize your list of File Locations:

1. From the dashboard, click your **username** in the top right of the screen.
2. Select **Administrative Settings** from the drop-down menu.
3. Click the **Choice Lists** tab.
4. In the drop-down menu next to Choice List, select **File Location**.
5. In the blank field below the Default Type buttons, type a custom file location (e.g., Intake Cabinet, Offsite Storage, etc.)
6. Click **Add Custom Type**.

Repeat the steps above to add additional locations as necessary.

The new File Location will appear in the right selection area.

Once the list is customized, users can assign any of the new file locations (or a user's name) to a Foreign National's file:

1. Search for the Foreign National using the **FN/Individual** module or **FN Search field** in the action bar.
2. Select the Foreign National.
3. Hover over the **Process Forms** tab.
4. Select **Assignment**.
5. Click the drop-down menu in the **File Location** section.
6. Select where the physical file is located.
7. Click **Update Info** in the upper right to save.

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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.