

Client Training HQ

Hiding Questions on a Questionnaire and Bundling to a Process

If you have Immigration Case Management (ICM) Administrative privileges, you can modify questionnaires for each process type to better suit your organizational needs.

To customize a default questionnaire for a process type:

1. Click your **username** in the upper right of the screen.
2. Select **Administrative Settings** from the drop-down menu.
3. In the **Firm Administration** module, click the **Processes** tab.
4. Click the **Default Questionnaires** tab.
5. The left side of the screen will display all the questionnaires available.
6. Click the **drop-down arrow** in the **Selected Process** section.
7. Select the process for which you would like to customize the questionnaires.
8. From the **Questionnaires** section, use the checkbox in the **Show** column to include or remove questionnaires for the selected process.
9. Clicking the name of the questionnaire will display all the questions associated with it.
10. Use the checkbox in the **Hide** column to hide the questions you do not want to display.
11. Click **Update Info** to save changes.

More Training Available!

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

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