

Modifying Required Documents

If you have Immigration Case Management (ICM) Administrative privileges, you can adjust the default required documents for process types. Follow the below instructions for adding and removing documents, creating custom documents, and customizing document instructions.

Reviewing Required Documents

We recommend reviewing your current settings prior to making substantial changes to your required documents and creating a backup in case you need to refer to the prior configuration.

To generate a report of all active process types and their required document configurations:

1. Click **your name** at the top right and select **Administrative Settings**.
2. Click the **Processes** tab.
3. Select the **Required Documents** sub-folder.
4. Click the **Print Required Document List** button.

Note: We recommend saving a copy of the report (by printing, saving as a PDF, etc.). You may also consider copying and pasting the contents of the report to a spreadsheet for staff review and comments, which can be referred to when implementing the changes in Administrative Settings. To do this, select/highlight the entire Required Documents report (ctrl+a on Windows) and copy (ctrl+c on Windows), and then paste into a spreadsheet (ctrl+v on Windows).

Modify Required Documents

To modify the required documents for a process type:

1. Click **Administrative Settings**.
2. Click the *Selected Process* drop-down arrow and select the desired process.

Note:

- **[FN]** = A document to be provided by the Foreign National
- **[HR]** = A document to be provided by the Hiring Representative (Employer)
- **[DI]** = Custom document instructions are present for this document.
- **[]** = This document is not enabled for this Process type.

Enabling Required Documents

To enable a document for the selected process type:

1. Search the list of available documents.
2. Select the appropriate document and click **Mark Docs as Used FN** to add it to the list of documents to be provided by the Foreign National, or select **Mark Docs as Used HR** to add it to the list of documents to be provided by the employer.

Disabling Required Documents

To disable a document for the selected process type:

1. Search the list of available documents.
2. Select the appropriate document and click **Mark Docs as Unused**.

Creating New Required Documents

We recommend searching the list of available documents prior to creating a new document in order to avoid creating duplicate or similar documents.

To create a new document:

1. Type the desired name in the **To Create a New Document** field.
2. Click **New Document**.

Notes:

- Required document titles are limited to 75 characters (including spaces). Required documents cannot be renamed, so take care when entering the name. If you need to change a required document name, you will need to delete the original document name and create a new document with the desired name.
- After creating a new document it will automatically be enabled for use by the FN. If you intend for this to be an employer-provided document instead, click Mark Docs as Unused and then re-enable the document with the Mark Docs as Used HR button.

Editing the Document Instructions

You can add optional document instructions to a document, which will be visible to the FN and/or HR user from their respective portals when reviewing and uploading documents.

To edit the document instructions:

1. Select the desired document from the available documents list.
2. Click **Edit Document Instructions**.
3. Enter the desired instructions and click either **Update** or **Apply to All Processes**.
(Update will apply the instructions for only the currently selected process type. Apply to All Processes will apply the instructions to all process types that currently have the selected document enabled.)

Sample Required Documents for H-1B CAP Process Type

Required Document	Special Instructions
Beneficiary's Passport ID Page	If you ever previously held any other status in the U.S. (e.g. H, L, O, TN, J), please include a complete copy of your passport.
Dependent's Passport ID Page	
Detailed Resume	
Diplomas or Degrees	In addition to your degree copies, please include mark sheets and/or transcripts for all your university degrees. Please also provide translations, if available.
Educational Evaluations	If you have a prior education evaluation of your university degree(s) from a U.S. evaluation agency, please provide a copy.
I-94 Copy	Copy of your I-94 from your most recent entry into the U.S. (This document should not be confused with the I-94 from your I-797 approval notice). Please go to the following link to retrieve your most current I-94: https://www.uscis.gov/I-94information
Marriage Certificate	Provide the "long form" certificate. If the marriage certificate does not list both spouse's full names, a notarized affidavit signed by two persons who attended the wedding, confirming full names, date of marriage, and place of marriage, will be required. You can provide one affidavit signed by both persons, or each individual can submit their own affidavit.
Most Recent Pay Stub	Include copies of your last three pay stubs.
Prior Status Documents	Copy of your most current and prior I-797 approval notices of your nonimmigrant status (e.g. H, L, O, TN, etc.), including Form DS-2019 or IAP-66 for J-1s, Form I-20 for F-1s, and EAD/work authorization cards. For visa-exempt Canadians, please send copies of passport stamps and/or I-94s. If you have an approved I-140 approval notice from a previous employer, please provide a copy.

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. Links to sources may be to third party sites. We have no control over and assume no responsibility for the content, privacy policies, or practices of any third party sites or services.