Client Training HQ

Offboarding ICM Firm Users

Immigration Case Management (ICM) Administrative users may occasionally need to offboard former Equifax® ICM Firm users.

Assessing the Firm User's Active Cases

Before offboarding a Firm user, the Administrative user should assess whether the Firm user has any active cases still open. To assess any active cases still belonging to the former Firm user:

1. Navigate to the **FN/Individual module**.
2. Select **All Foreign Nationals** from the FN drop-down options.
3. Select **Active Cases - All Divisions** from the case drop-down options.
4. Select **CM (Last, First) for Case Manager Firm users** or **RA (Last, First) for Responsible Attorney Firm users** and enter the applicable Firm user's last and first names.

Reassigning the Firm User's Active Cases

To reassign *all* the Firm user's active cases to another ICM user, either submit a request by emailing ICMSupport@equifax.com or submit an in-system ticket via the Help button.

Alternatively, to reassign cases *individually* to various other ICM users:

1. From the search results, click the **specific case link within the Process column**.
2. Select the **Assignment** sub-folder.
3. Reassign each case as desired, then click **Update Info**.

Retiring the Firm User

Once the Firm user's cases have been reassigned, to retire the Firm user:

1. Click your **username** at top right, then select **Administrative Settings**.
2. Click the **Users tab**.
3. Click the appropriate **Firm user name**.
4. Scroll to the bottom right and click **Retire This User** to prevent the user from logging in.

Note: If you need more time to reassign the Firm user's active cases but want to remove their ability to login, prior to retiring the Firm user, set the Restricted Web Access setting to Yes from the Firm user's General tab in Administrative Settings.

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.

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