

Client Training HQ

Creating an Annual Maintenance Fee Report

You may be subject to Annual Maintenance Fees (AMFs), depending on your Immigration Case Management (ICM) plan. This fee is dictated by the amount of file storage being utilized per Foreign National (FN).

To pull the AMF information and create a report to better estimate any applicable fees:

1. In the top toolbar next to the Search field, click **New**.
2. Select **Report** from the drop-down menu.
3. A new screen will appear. Select **Data Type**.
Note:
 - If you need only the AMF and related FN information, select **FN**.
 - If you need to include process-specific data (i.e., activities), select **FN + Process**.
4. Click **Continue**.
5. In the **General Information** tab **Report Name** field, enter your preferred title for this report, as well as any applicable selections.
6. Click **Update Info**.
7. After the page reloads, click the **Report Columns** tab.
8. Hold down the **Ctrl** key and select **AMF Date**, **AMF Current Size KB**, **AMF Max Size KB**, and **First Case Initiation Date** from the *Available Columns* list.
9. Release the **Ctrl** key and click **Add Columns**.
10. Click **Update Info**.
11. After the page reloads, click the **Report Criteria** tab.
12. Every selection should be set to **All**, with **Case Status** being set to **All + Retired**. All other fields should be blank.
13. Click **Update Info**.
14. Click **Run Report** to generate the report, or for reports over 1,000 records, schedule the report to run on a specific day by selecting a day of the week from the **Automatic Update** pop-up menu.

Note: There are limits on the overall size of any single report. Manually run reports have a limit of 1,000 records. Scheduled reports are limited to 5,000 records. Reports containing more than 10,000 records cannot be produced. To determine if your report is within these limits, click **Calculate**.

The system will return a report with all FNs and their associated AMF data, sorted by the last name of the beneficiary as a default.

Refining your Data

To filter your results based on a maximum amount of allowable data per FN:

1. Click the **Report Criteria** tab for the report.
2. Scroll down to the **Search Criteria** section.
3. Select **AMF Max Size KB** from the left drop-down menu.
4. Select **Greater or equal** in the second drop-down menu.
5. Type "100" in the field to the right of the second drop-down menu.
6. Click **Update Info**.
7. Click **Run Report**.

Using these criteria, the report will show a list of FNs that have exceeded 100KB and have triggered an AMF fee.

Click **Duplicate Template** to create a copy of the report. Then, change the Search Criteria to generate a list of FNs whose AMF Max Size is approaching the 100KB limit. The duplicate template will be named "Copy of (template name)" by default, but you can change it in the **General Info** tab of the new template.

More Training Available!

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

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