

Immigration Case Management (ICM)

Power User Series

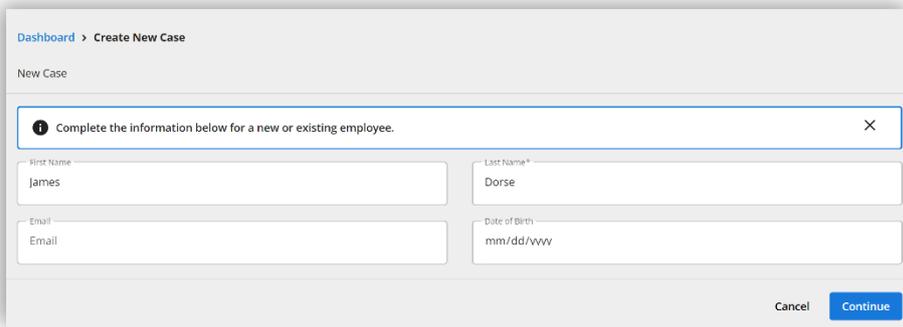
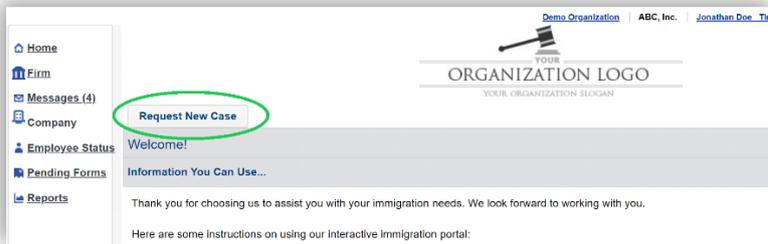
Our HR Request system allows for secure intake of new case requests from your Corporate HR users through the HR Portal.

Highlights

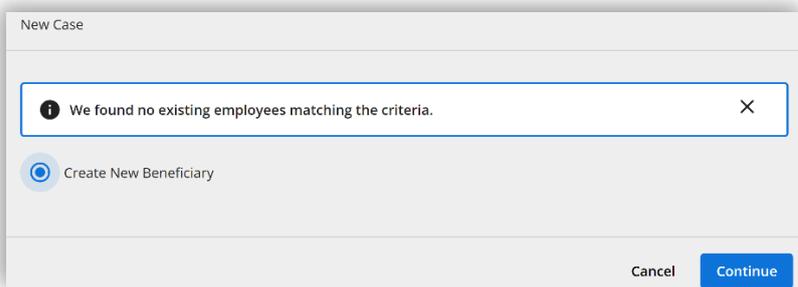
- Create fully customizable, company-specific request templates
- 100 custom questions/fields can be added to your custom fields library
- Approximately 100 system fields are available (providing a library of 200 customizable questions)

How it Works

Once logged into the HR portal, HR Users, for whom the HR Request portal is active, will see the **Request New Case** button at the top of the home page. Once selected, the HR User will be prompted to search for the employee, and can then either create a request for an existing employee, or create a new employee.



The screenshot shows the 'Create New Case' form. The breadcrumb is 'Dashboard > Create New Case'. The form title is 'New Case'. A message box says 'Complete the information below for a new or existing employee.' The form has four input fields: 'First Name' (value: James), 'Last Name*' (value: Dorse), 'Email' (value: Email), and 'Date of Birth' (value: mm/dd/yyyy). There are 'Cancel' and 'Continue' buttons at the bottom right.



The screenshot shows the 'New Case' dialog box. A message box says 'We found no existing employees matching the criteria.' Below the message is a radio button labeled 'Create New Beneficiary'. There are 'Cancel' and 'Continue' buttons at the bottom right.

Each Company may have their own unique template. HR Users who are linked to multiple companies can select the company and the template will update to the correct version to be submitted.

Note: the tab names and the content of each page are fully customizable. See [Managing Templates](#).

When an HR Request is submitted by the HR User, the below will automatically occur:

- The "HR Request" will be listed on your FN search screen (and is available for reports).
- A complete summary e-mail notification will be distributed to the assigned team for that Company. The e-mail will provide full details on the submitted HR request.
- All information collected (including information for custom questions) are loaded into the Employee/FN profile. Custom questions and responses are visible under the Financial/Miscellaneous tab.
- The employee and the petitioning company are automatically linked.

View from the FN Search Screen with HR request Summary:

Case #	Beneficiary	Process	Summary	Creation
38855 HR Request	Dorse, James Roland	HR Request*	View HR Summary	10/10/2017 17:10:05 CMT(DST)
1707-0100780996 HR Request	Johnson, Robert Steven	HR Request*	View HR Summary	07/25/2017 10:53:31 GMT(DST)
1706-0100770696 HR Request	Robins, Steven	HR Request*	View HR Summary	06/09/2017 16:34:13 GMT(DST)

Records 1 - 3 Displayed of 3

*Dep (Dependent) An X in this column indicates the FN is a dependent of another. (Hold mouse over the X to see the FN's Name, click it to view that case)
 *Stat (Case Status): = Open, X = Closed, Process: * = Current Process for FN

The HR Request Summary is displayed directly on the FN Search Page.

The HR Summary contains all questions posed to HR and all responses received.

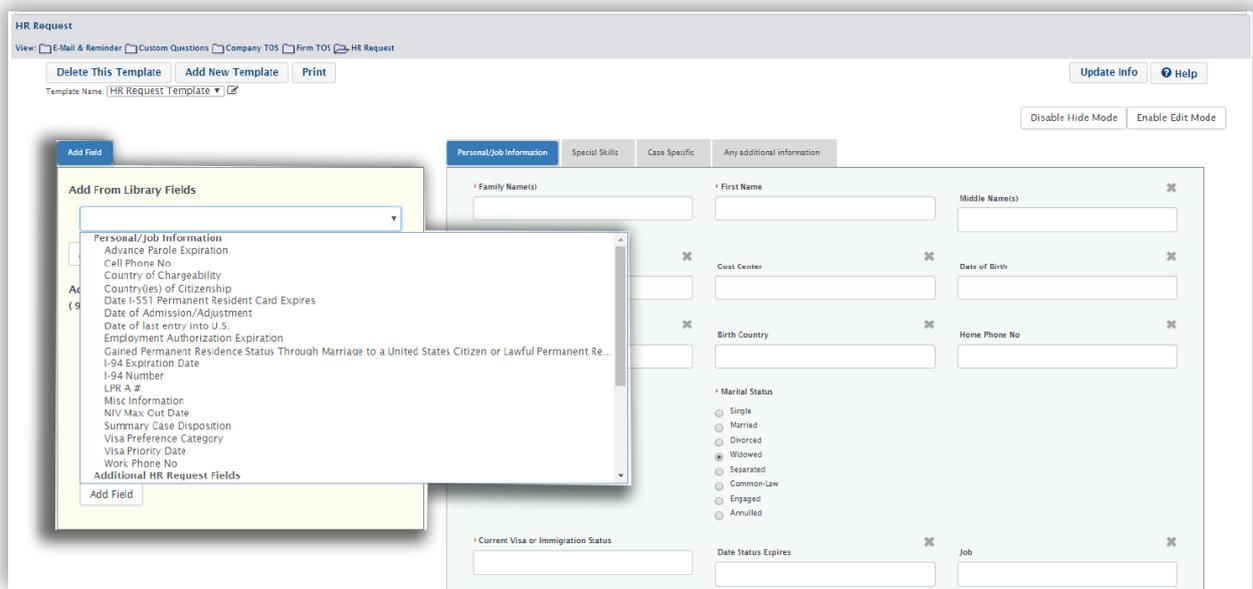
Family Name(s)	Dorse
First Name	James
Middle Name(s)	Roland
Employee ID	3434343
Cost Center	Software Development
Date of Birth	10/04/2017
Birth Country	UK
Country(ies) of Citizenship	UNITED KINGDOM
Gender	Male
Marital Status	Single
Work Phone No	555 555 5555
Home Phone No	666 666 6666
Cell Phone No	555 555 5555
E-mail	email@email.com
Advance Parole Expiration	-
Employment Authorization Expiration	-
NIV Max Out Date	-
Date of last entry into U.S.	-
I-94 Number	-
I-94 Expiration Date	-
Current Visa or Immigration Status	H-1B
Date Status Expires	06/15/2018

Managing Templates as an Administrator

Administrators can quickly and easily create HR Request Templates which can then be assigned to Company profiles in ICM. The following gives an overview of the tools and options available for managing templates in the new HR Request module.

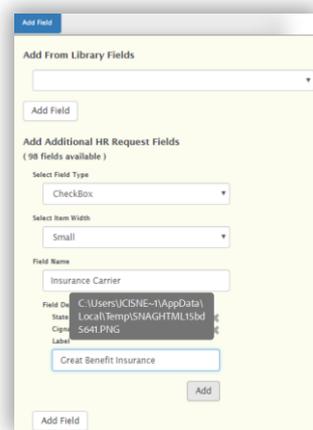
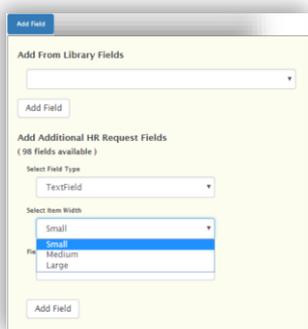
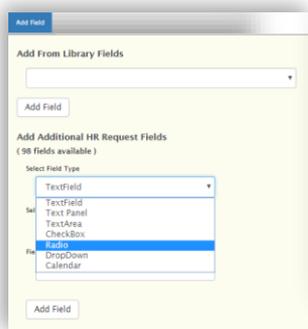
1. Administrators may create new Templates from the default template provided by ICM (which contains about 100 system fields) or copy from a previously created and formatted template to save time. Admins may create as many Templates as needed to support the unique needs of their corporate clients.

- Users may select from an extensive library of system data fields for inclusion on the Template. As the firm adds custom fields they are added to the library of data fields.

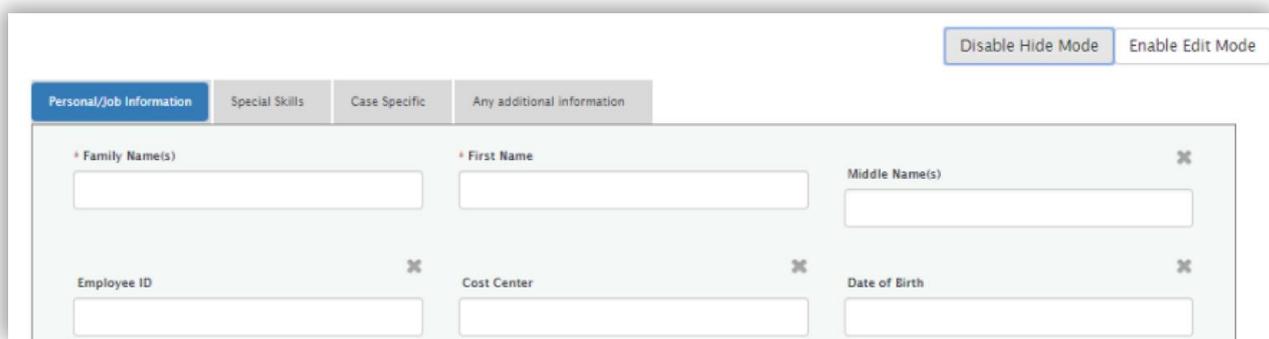


- Adding new fields to the Library is straightforward and offers several customization options:

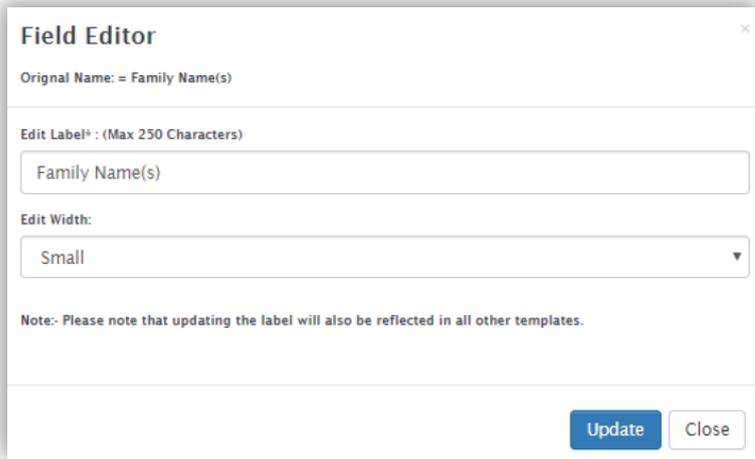
- I. Select Field Type
- II. Select item width: Small, Medium or Large
- III. Create a Field Name
- IV. Enter the titles for the allowed responses



- Form Fields may be removed from the template by using the "Hide Mode" and clicking the "x"

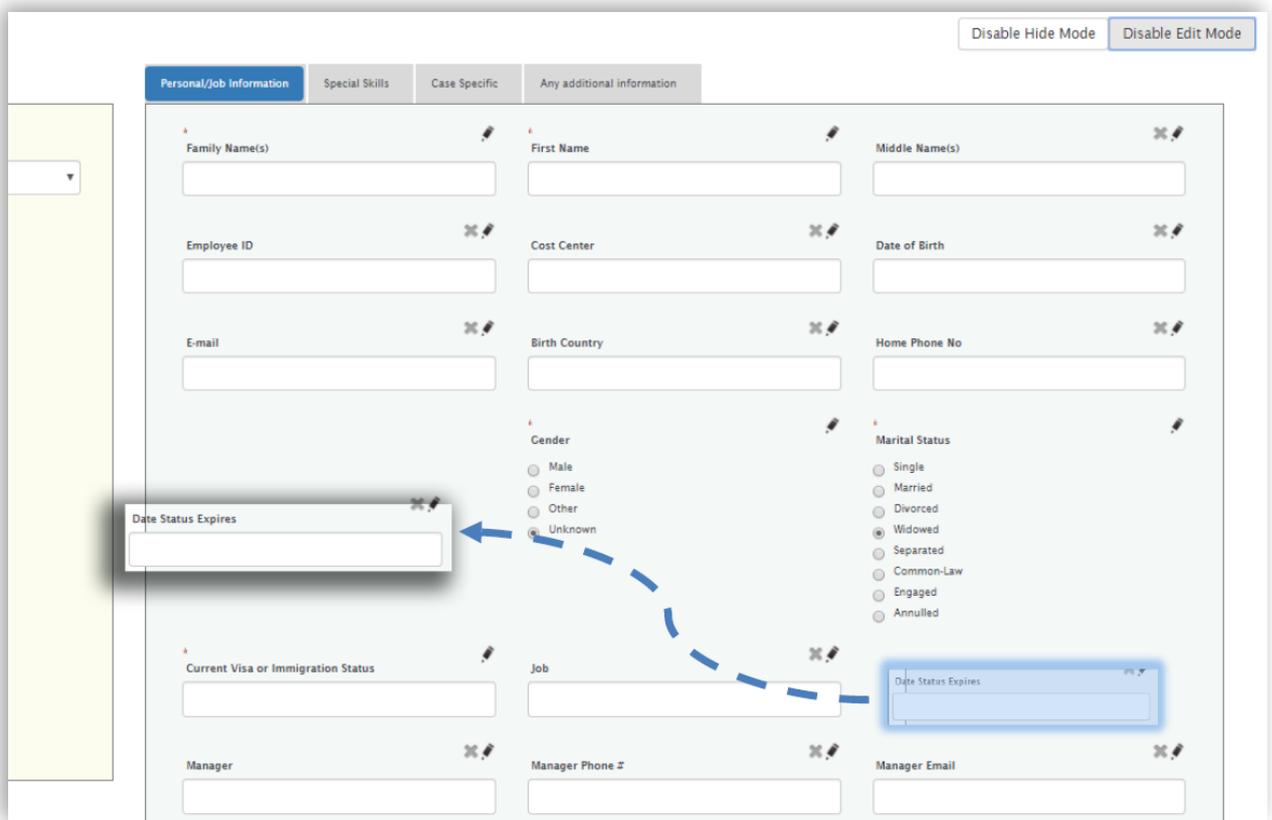


5. Individual Field properties, including the question title and field size may be edited by utilizing the “Edit Mode” and clicking on the “Pencil” icon, this opens the Field editor pop-up.



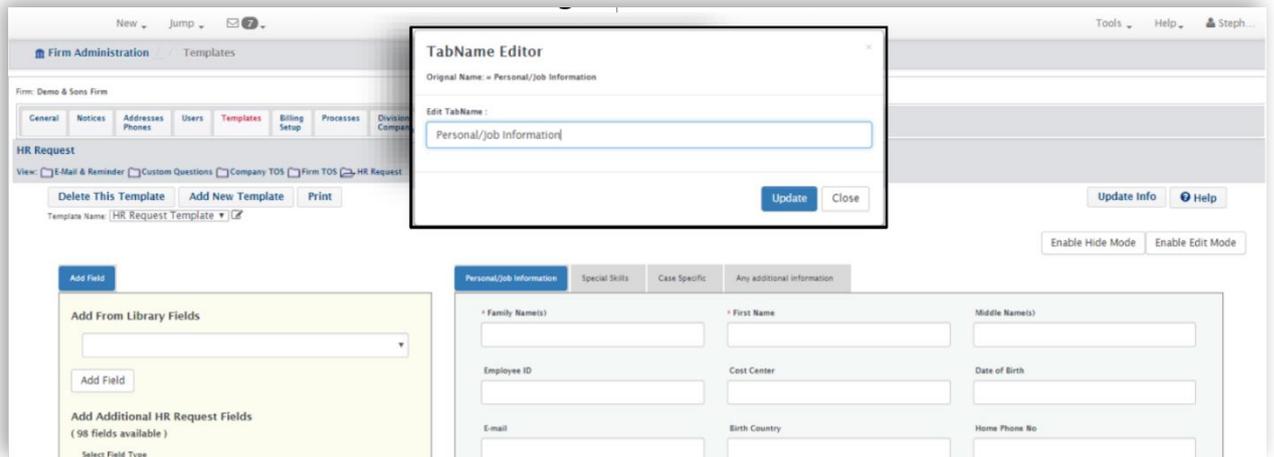
The Field Editor pop-up window has a title bar with 'Field Editor' and a close button. Below the title bar, it shows 'Original Name: = Family Name(s)'. The main section is titled 'Edit Label* : (Max 250 Characters)' and contains a text input field with 'Family Name(s)'. Below this is an 'Edit Width:' dropdown menu currently set to 'Small'. A note at the bottom states: 'Note:- Please note that updating the label will also be reflected in all other templates.' At the bottom right, there are 'Update' and 'Close' buttons.

6. Once a field is added to a template, Users may drag and drop the field into the desired position on the page. Placement will be dependent on the size of the field and the available space in the row.

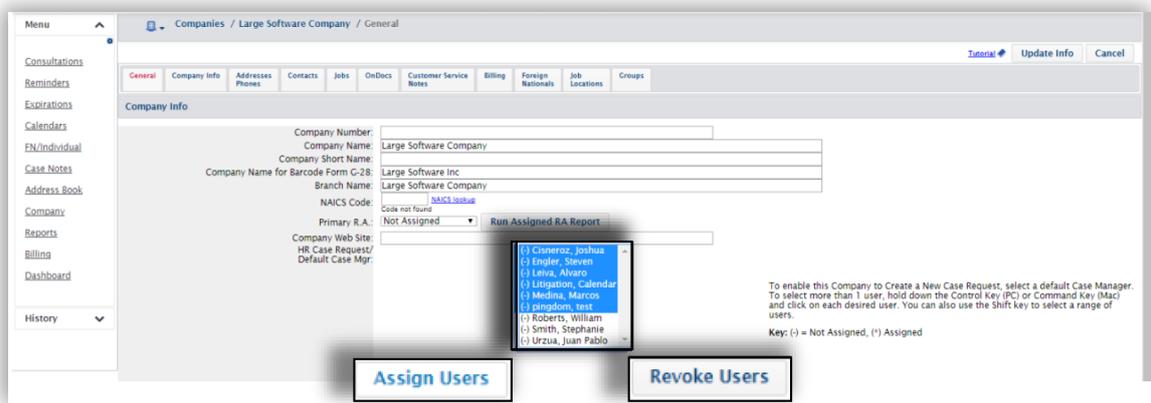


The image shows a form template with several tabs: 'Personal/Job Information', 'Special Skills', 'Case Specific', and 'Any additional information'. The 'Personal/Job Information' tab is active. The form contains various input fields: 'Family Name(s)', 'First Name', 'Middle Name(s)', 'Employee ID', 'Cost Center', 'Date of Birth', 'Email', 'Birth Country', 'Home Phone No', 'Gender' (with radio buttons for Male, Female, Other, and Unknown), 'Marital Status' (with radio buttons for Single, Married, Divorced, Widowed, Separated, Common-Law, Engaged, and Annulled), 'Current Visa or Immigration Status', 'Job', 'Manager', 'Manager Phone #', and 'Manager Email'. A 'Date Status Expires' field is shown being dragged from a floating position on the left to a position within the 'Job' field's row. A blue dashed arrow indicates the drag path. In the top right corner, there are buttons for 'Disable Hide Mode' and 'Disable Edit Mode'.

- Each "Tab" name can be edited by "double-clicking" the tab name. This opens the "Tab Name Editor" which permits each tab name to be changed.



- Activation of the HR system for each Company requires two steps:
 - Assign the primary Contact or team members who will be notified on new HR Requests



- Assign a Template to the Company
 - From the HR Request Dropdown menu, choose from your library of custom templates. Be sure to update after saving. Once this is completed the HR Request System will be activated for your HR Users.

