Immigration Case Management (ICM)

Power User Series

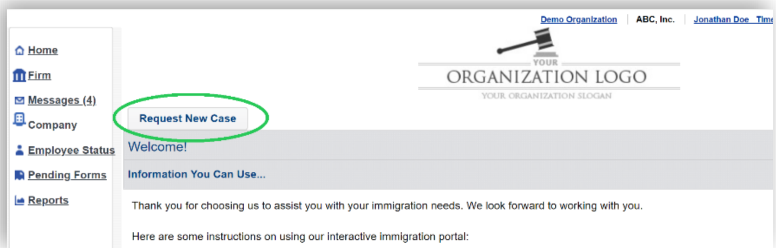
Our HR Request system allows for secure intake of new case requests from your Corporate HR users through the HR Portal.

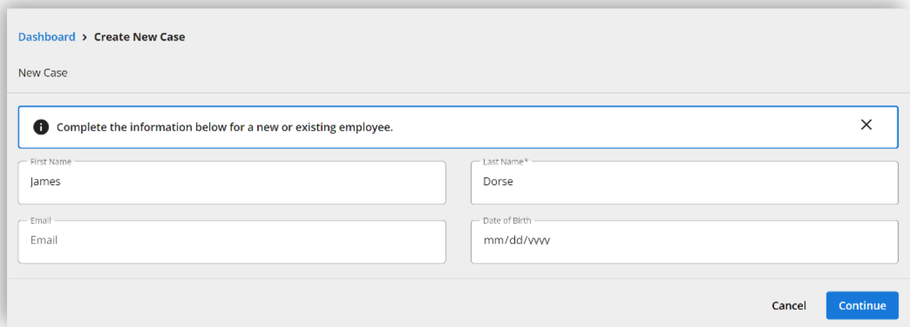
Highlights

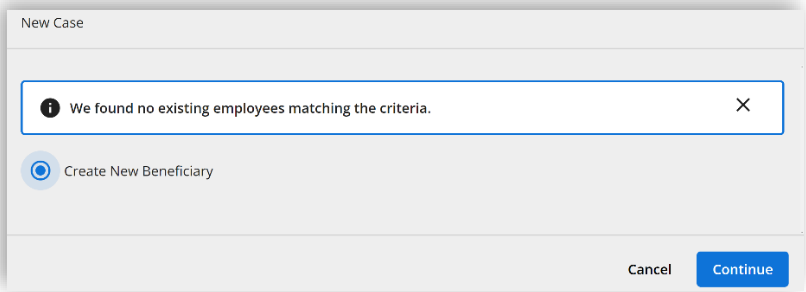
- Create fully customizable, company-specific request templates
- 100 custom questions/fields can be added to your custom fields library
- Approximately 100 system fields are available (providing a library of 200 customizable questions)

How it Works

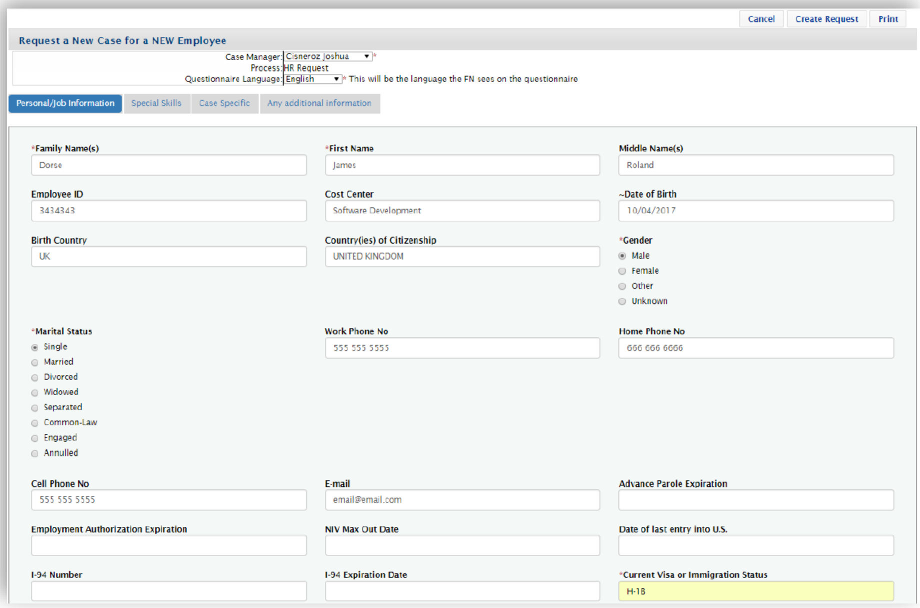
Once logged into the HR portal, HR Users, for whom the HR Request portal is active, will see the **Request New Case** button at the top of the home page. Once selected, the HR User will be prompted to search for the employee, and can then either create a request for an existing employee, or create a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







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.

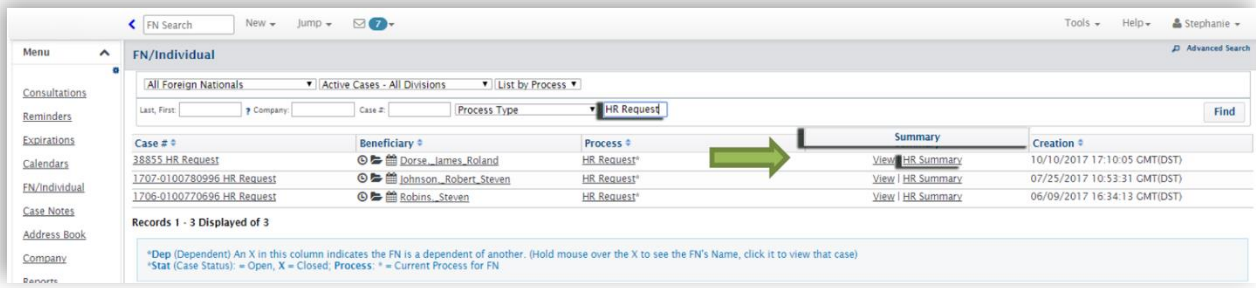


Note: the tab names and the content of each page are fully customizable. See Managing Templates.

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

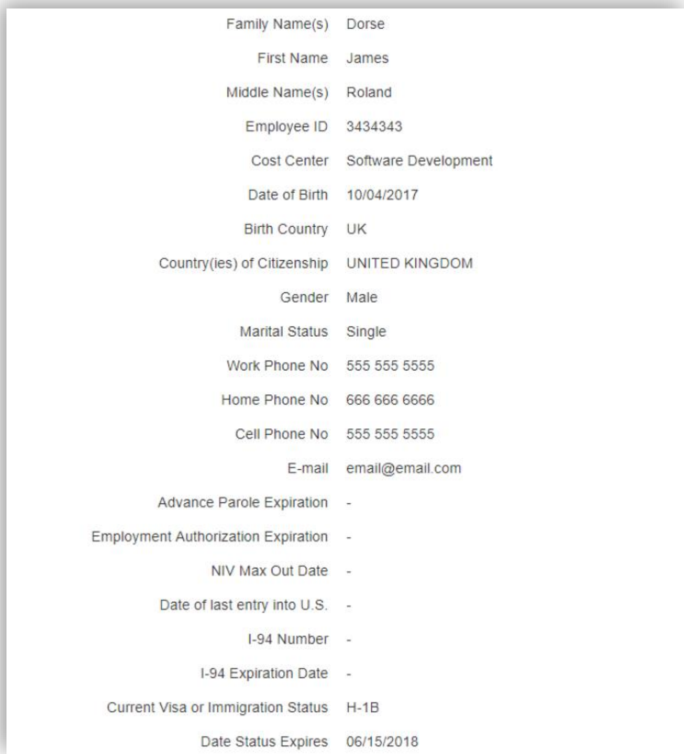
- The “HR Request” will be listed on your FN search screen (and is available for reports).
- A complete summary e-mail notification will be distributed to the assigned team for that Company. The e-mail will provide full details on the submitted HR request.
- All information collected (including information 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:



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

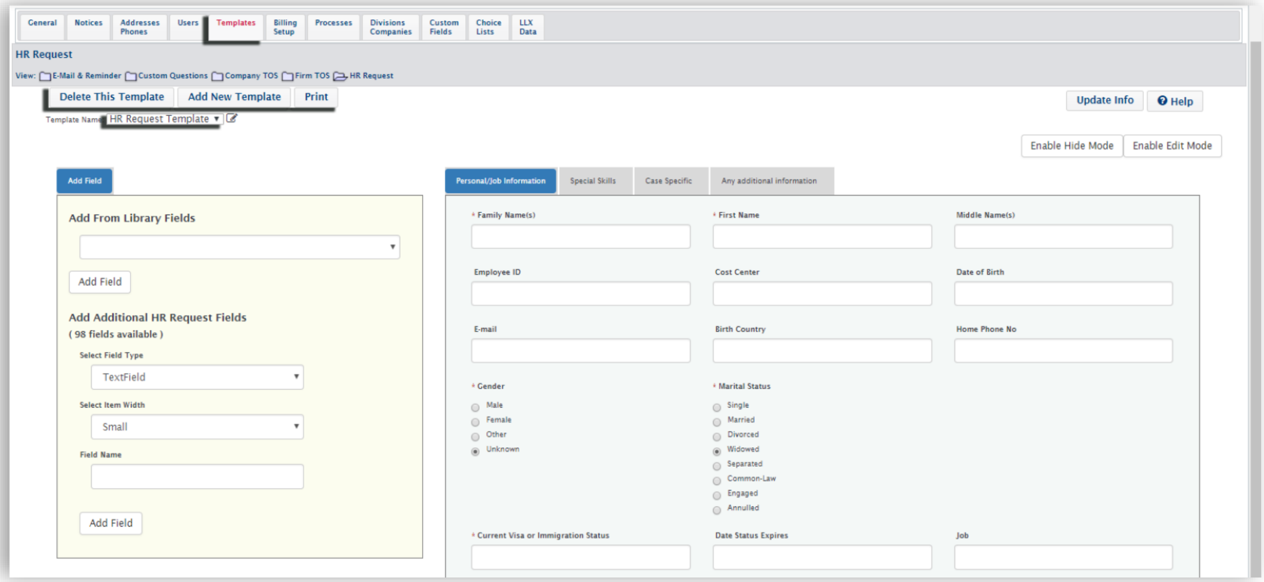
The HR Summary contains all questions posed to HR and all responses received.



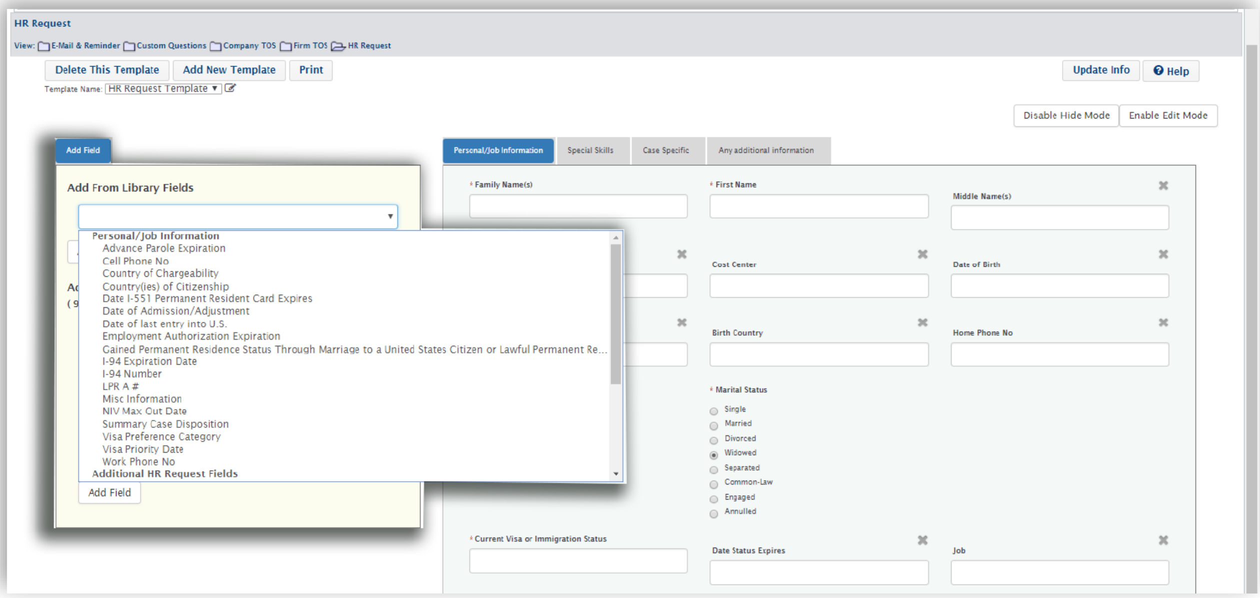
Managing Templates as an Administrator

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.

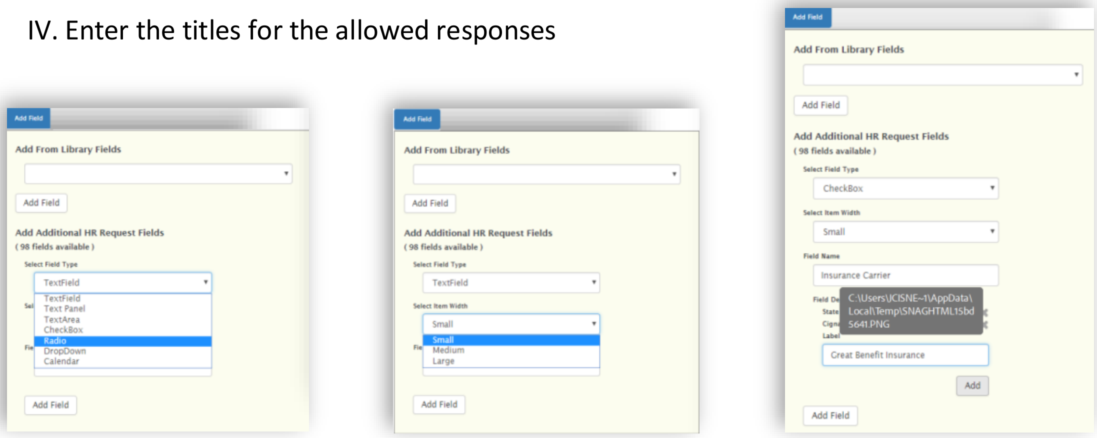
1. Administrators may create new Templates from the default template provided by ICM (which contains about 100 system fields) or copy from a previously created and formatted template to save time. Admins may create as many Templates as needed to support the unique needs of their corporate clients.



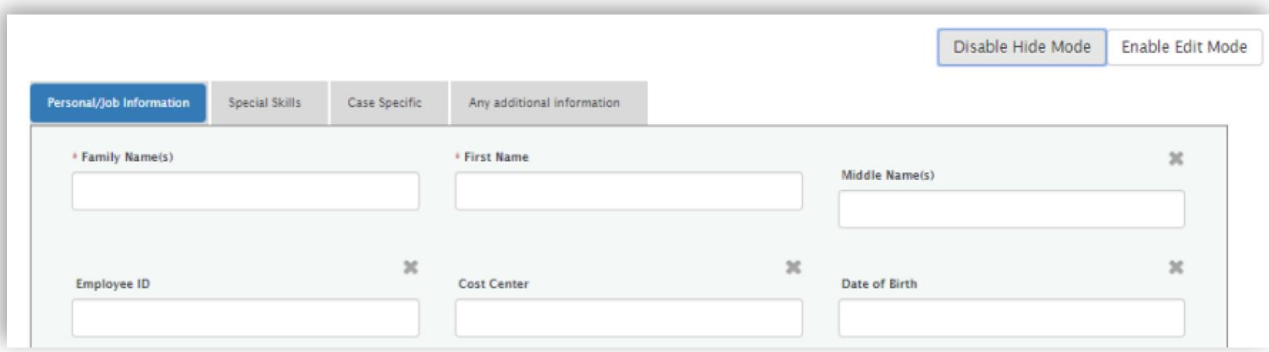
2. Users may select from an extensive library of system data fields for inclusion on the Template. As the firm adds custom fields they are added to the library of data fields.



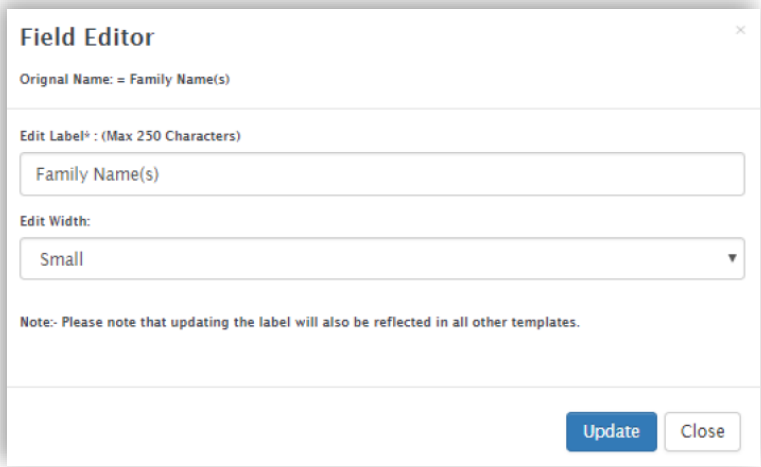
3. Adding new fields to the Library is straightforward and offers several customization options:
   I. Select Field Type
   II. Select item width: Small, Medium or Large
   III. Create a Field Name
   IV. Enter the titles for the allowed responses



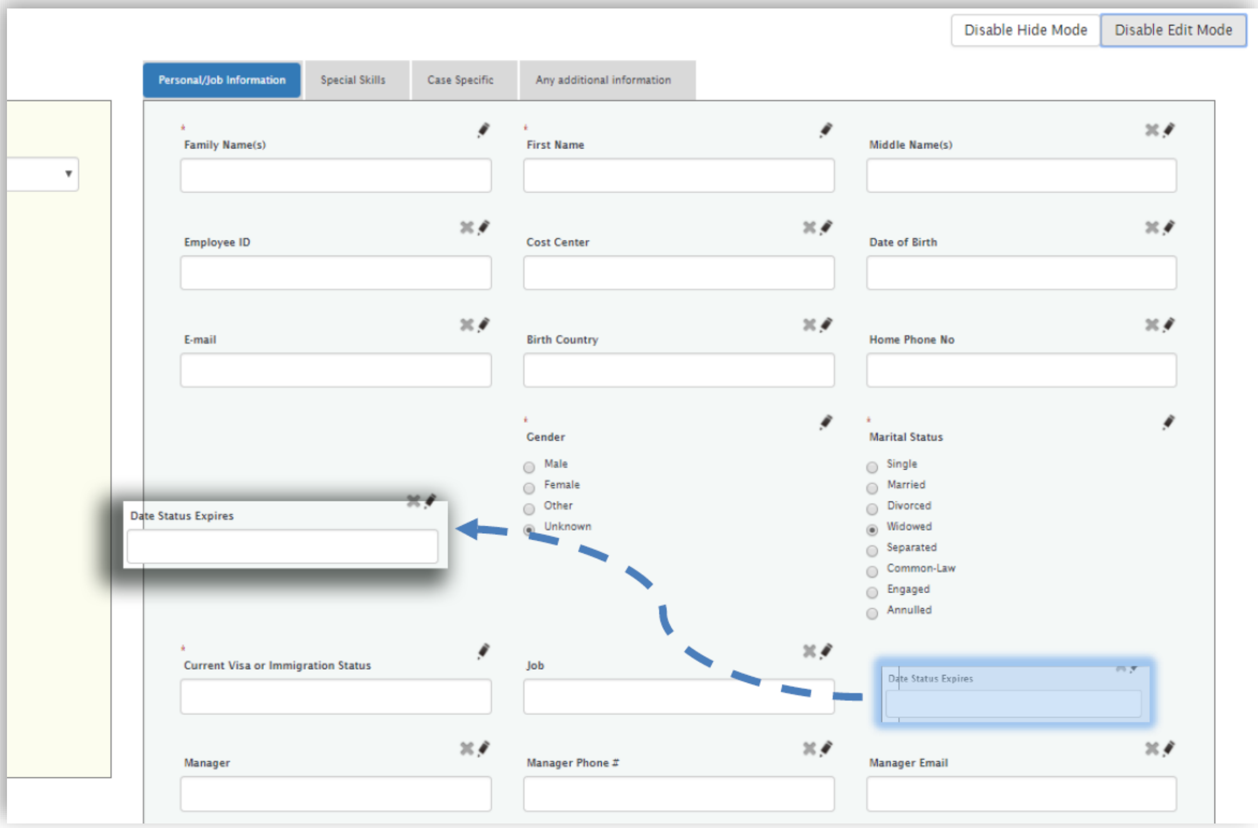
4. Form Fields may be removed from the template by using the “Hide Mode” and clicking the “x”



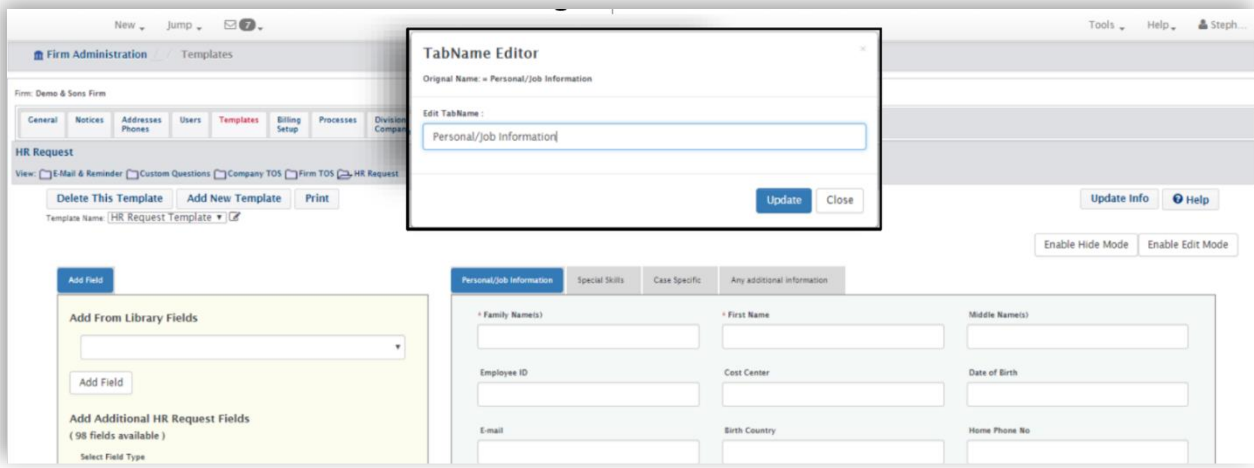
5. Individual Field properties, including the question title and field size may be edited by utilizing the “Edit Mode” and clicking on the “Pencil” icon, this opens the Field editor pop-up.



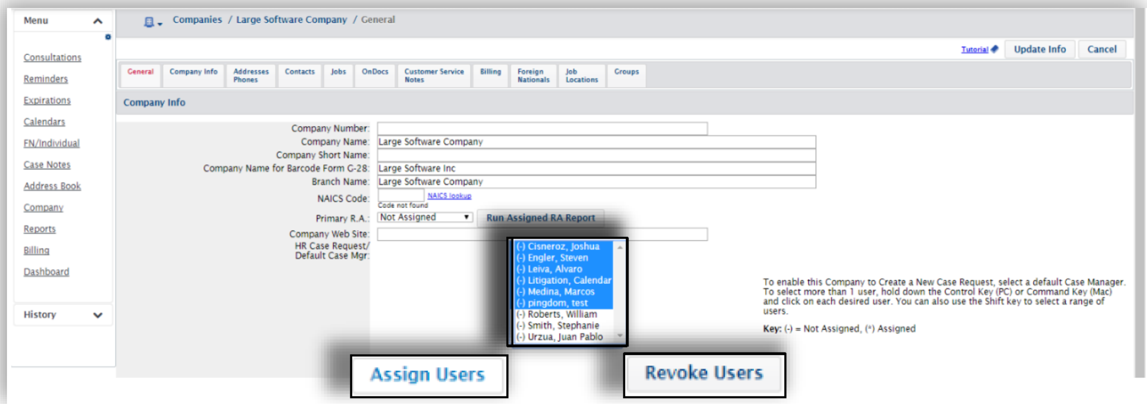
6. Once a field is added to a template, Users may drag and drop the field into the desired position on the page. Placement will be dependent on the size of the field and the available space in the row.



7. 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.



8. 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



9. 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.