

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.

home		Demo Organization ABC, Inc.	Jonathan Doe Tim
firm Eirm		ORGANIZATION LOGO	
 Messages (4) Company Employee Status 	Request New Case Welcome!	YOUR ORGANIZATION SLOGAN	
Pending Forms	Information You Can Use		
Reports	Thank you for choosing us to assist you with your immigra	tion needs. We look forward to working with you.	
	Here are some instructions on using our interactive immig	ration portal:	

	a new or existing employee.			
irst Name		Last Name*		
mail		Date of Birth mm/dd/vvvv		
			Cancel	C
ew Case				
We found no existing emp	loyees matching the criteria	a.	×	
We found no existing emp	loyees matching the criteria	a.	×	

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.

		Cancel Create Request Prin
quest a New Case for a NEW Employee Case Questionnaire L const/job Information Special Skills Case Specific	Manager (Caneroz Jophua •)* Process HR Requett anguage (English •)* This will be the language the FN sees on the i anguage (English •)* This will be the language the FN sees on the i	questionnaire
*Family Name(s)	*First Name	Middle Name(s)
Dorse	James	Roland
Employee ID	Cost Center	-Date of Birth
3434343	Software Development	10/04/2017
Pirth Country	Country(ior) of Citizanchia	1Condor
	LINITED KINCDOM	Mile
UK		Female
		Other
		O Unknown
*Marital Status	Work Phone No	Home Phone No
Single	555 555 5555	666 666 6666
Married		
 Divorced 		
 Widowed 		
 Separated 		
Common-Law		
 Engaged 		
 Annulled 		
Cell Phone No	E-mail	Advance Parole Expiration
555 555 5555	email@email.com	
Employment Authorization Expiration	NIV Max Out Date	Date of last entry into U.S.

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 email 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:

Menu ^	FN/Individual					D Advanced Sea
Consultations	All Foreign Nationals	Active Cases - All Divisions 🔹 List by Pro	cess 🔻			
Reminders	Last, First: 7 Company:	Case 2: Process Type	HR Request			Find
xpirations	Case # 0	Beneficiary \$	Process ©		Summary	Creation •
Calendars	38855 HR Request	🖸 陆 🛗 Dorse, James_Roland	HR Request*		View HR Summary	10/10/2017 17:10:05 GMT(DST)
a fred ad ad	1707-0100780996 HR Request	🖸 🏷 🋗 Johnson_Robert_Steven	HR Request*		View HR Summary	07/25/2017 10:53:31 GMT(DST)
N/Individual	1706-0100770696 HR Request	🕒 陆 Robins, Steven	HR Request*		View HR Summary	06/09/2017 16:34:13 GMT(DST)
<u>ase Notes</u> Address Book	Records 1 - 3 Displayed of 3					
<u>ompany</u>	*Dep (Dependent) An X in this column *Stat (Case Status): = Open, X = Close	indicates the FN is a dependent of another. (Hol d; Process: * = Current Process for FN	d mouse over the X to see the FN's Nar	me, click it to view that	case)	

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

The HR Request Summary is

The HR Summary contains all questions posed to HR and all

responses received.

Page.

displayed directly on the FN Search

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.

equest			
🗅 E-Mail & Reminder 🏠 Custom Questions 🏠 Company TOS 🏠 Firm TOS 🔁 HR Requ	est		
Delete This Template Add New Template Print			Update Info 🛛 😧 Help
Template Name HR Request Template 🔻 🕼			
			Enable Hide Mode Enable Edit Mod
			Litable Hide Hidde Litable Luit Mod
Add Field	Personal/Job Information Special Skills	Case Specific Any additional information	
Add From Library Fields	* Family Name(s)	* First Name	Middle Name(s)
	•		
add mild	Employee ID	Cost Center	Date of Birth
Add Field			
Add Additional HR Request Fields			
(98 fields available)	E-mail	Birth Country	Home Phone No
Select Field Type			
TextField			
Textrieid	* Gender	* Marital Status	
Select Item Width	Male	Single	
Small	Female Orbus	Married	
	Unknown	Widowed	
Field Name		Separated	
		Common-Law	
		Engaged	

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.

							Update info	🔉 🔞 Help
emplate Name: HR Request Template 🔻 🖉								
							Disable Hide Mode	Enable Edit Mod
Add Field	Personal	/Job Information Special Skills	Case Specific	Any additional information				
Add From Library Fields	* Fai	mily Name(s)		* First Name	M	iddle Name(r)		ж
						Note Hame(a)		
Personal/lob Information			1					
Advance Parole Expiration			×		36			×
Country of Chargeability				Cost Center	Da	ate of Birth		
Ac Country(ies) of Citizenship								
(9 Date of Admission/Adjustment								
Date of last entry into U.S. Employment Authorization Expiration			×	Birth Country	36 Ho	ome Phone No		×
Gained Permanent Residence Status Through	Marriage to a United States Citizen	or Lawful Permanent Re						
I-94 Expiration Date								
LPR A #				Marital Status				
NIV Max Out Date				 Single 				
Summary Case Disposition				 Married 				
Visa Preference Category Visa Priority Date				 Divorced Widowed 				
Work Phone No				Separated				
Additional HR Request Fields				Common-Law				
				 Engaged 				
Add Field								
Add Field				Annulled				

- 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

Add Text	Aut faut	• Add Field
Add From Library Fields	Add From Library Fields	Add Additional HR Request Fields
Add Field Add Additional HR Request Fields (96 fields available) Steer find Type TextField TextField Field Field Add Field Add Field Add Field	Add Freid Add Additional HR Request Fields (96 fields wallable) Steen find Type Textifield Smull Medium Add Field Add Field	(*) fered a water CheckBox • Setel ten Weith Small • Fut dears Fut dears Cubers/CENF-1/AppData Smal Local/Imp/SMACHTML150d • Composition SMACHTML150d • Compositi

Add From Library Fields

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

					Disable Hide Mod	de Enable Edit M
Personal/Job Information	Special Skills	Case Specific	Any additional information			
* Family Name(s)			First Name		Middle Name(c)	×
		ж		ж		ж
			Cost Costor		Date of Black	

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.

Drignal Name: = Family Name(s)	
Edit Label* : (Max 250 Characters)	
Family Name(s)	
Edit Width:	
Small	

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.

Personi Fa	al/Job Information Special Skills amily Name(s) mpToyee ID mail	Case Specific	Any additional information * First Name Cost Center	# %.#	Middle Name(s) Date of Birth	26 /
v En	amily Name(s) mployee ID -mail	# %#	First Name	۶ ۲.۶	Middle Name(s) Date of Birth	21 # 21 #
En E-	mployee ID -mail	**	Cost Center	×.#	Date of Birth	36 #
٤٠	mail	×.4				
			Birth Country	×¢	Home Phone No	31 <i>4</i>
			* Gender		* Marital Status	,
Date Status	Expires	-	Male Female Other Unknown		Single Married Divorced Widowed Separated	
					Common-Law Engaged Annulled	
Cu	urrent Visa or Immigration Status		Job	*/	Date Status Expires	
Ma	lanager	3K 🖋	Manager Phone #	×.	Manager Email	26.4

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.

firm Administration // Templates	TabName Editor	*	
Demo & Sons Firm	erigina naros, - i e zonar pre internazioni		
Ceneral Notices Addresses Users Templates Billing Processes Division	Edit TabName :		
Panuest	Personal/Job Information		
Company TOS Firm TOS HR Request Company TOS Firm TOS HR Request			
Delete This Template Add New Template Print			
Template Name HR Request Template		Update Close	Update into Update into
Template Name [HR Request Template ¥]		Update Close	Enable Hide Mode Enable Edit Mode
Template Name [HR Request Template ¥]	Personal/job Information Special Skills (Update Close	Enable Hide Mode Enable Edit Mo
Template Name (HR Request Template *) CP Add Falt Add From Library Fields	Personal,Sab Information Special Skills (+ Family Name(s)	Update Close Construction Any additional information + First Name	Update inno V Help Enable Hide Mode Enable Edit Mo
Template Name (HR Request Template *) 2 Add Flot Add From Library Fields Add Field	Personal(stite Information Special Skills (+ Family Name(s) Employee ID	Care Specific Any additional information + First Name Cost Center	Update mno V Help Enable Hide Mode Enable Edit Mo Middle Name(a) Date of Birth

- 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

onsultations	Tuessial * Update Info														
eminders	Central Company Inf Adversus Contacts Jobs Contoner Service Billing Fareign Job Company Compan														
xpirations	Company Info														
alendars	Company Number														
N/Individual	Company Name: Large Software Company														
ase Notes	Company Short Name: Company Lange To Fascode Form C-28: Large Software Inc.														
ddress Book	Branch Name: Large Software Company														
ompany	NAICS Code: AMAS lookup MASS lookup														
eports	Primary R.A.: Not Assigned Run Assigned RA Report														
illing	Company Web Site: HR Case Request/ (c) Cinneroz, Joshua														
ashbasad	Default Case Mgr: () Engler, Steven () Linger, Alberg														
lashboard	() Liningation, Calendar To enable this Company to Create a New Case Request, select a default Case Manar														
	(c) Medina, Marcos To Select mole than 1 user, noio down the Control key (PL) or Commano key Mag (c) pringion, test and click on each derined user. You can also use the Shirt Key to select ange of														
istory 🗸	(-) Roberts, William users. (-) Smith, Stephanie Kac (-) – Not Assigned (-) Assigned														
	(-) Urzua, Juan Pablo * Key, (-) Hor Horginito, (-)														

- 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.

0															
Consultations													Tutorial 🛷	Update Info	Cancel
Reminders	General	Company Info	Addresses Phones	Contacts	Jobs	OnDocs	Customer Service Notes	Billing	Foreign Nationals	Job Locations	Groups				
xpirations	Company	/ Info													
alendars			Company	/Number:											
V/Individual	Company Name:				Large Software Company										
asa Notas	Company Short Name:														
ase inotes	Company Name for Barcode Form G-28:				Large Software Inc										
ddress Book	MAICE Code:				NAICS lookup										
ompany				nes code.	Code not	found	• Bun Acc	lanad D4	Benert						
eports		Company													
illing			HR Case	Request/			(*) Cieneroz	lochuo				_			
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ashbuaru							(*) Leiva, Ah (*) Litigation	/aro L Calend	ar		To	nable this Company	to Create a Ne	w Case Request,	select a
							(*) Medina,	Marcos	~		defa Con	ult Case Manager. T trol Kev (PC) or Com	Fo select more i nmand Key (Ma	than 1 user, hold c) and click on ea	down th ch desire
History 🗸							(-) pingdom (-) Roberts,	, test William			use	r. You can also use t	he Shift key to	select a range of	users.
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						Assign	Jsers		Revoke U	Isers					
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		N Summary	Not Assigned						sum	summary pages viewable by FNs and HRs for this Company.					
		F	N Welcome	Template:	Not As	signed 🔻					e-m	ails for FNs petition	ate selected will ed by this Com	pany.	erate wei
			HR Request	Template:	Defau	t	*				The new	HR Request Templa Case or Process.	te selected will	be used when H	R request
	HR Welcome Template:					HR Request Template					The HR Welcome Template selected will be used to generate welcome e-mails for HRs working for this Company				
			Questionnair	e Locked:	Tamik	as Version					wen	in the contains for the	ig for a	ine elementary.	