Enhanced Process Activities

With the deployment of enhanced activity tracking, organizations can pre-define target dates and assign activity responsibility within process types to develop and analyze metrics for performance, establish processing times and formulate to-do lists for users. Target dates provide visual cues to users within the foreign national's Activities tab to indicate timeliness. Target dates as well as completion information is reportable through the Activities report.

If your Edge site has already been implemented please contact Custom Support to request activation of the **Enhanced Processes Activities** feature. If are still in the implementation process please reach out to your Implementation & Training Specialist.

| La → FN | /Individual / | Abbott, Ja | imes Vern (| 123456789), | Processe | es Forms | | | | | | | |
|--------------------------------|--------------------------------|--------------------|---------------------------|-------------------------|-------------------|-----------------------|-----------------|---------------|-----------------|------------------|---|-----------------------|--------|
| (A# 12345678 | 9) [AOS Family |] RJR/RJR/-/ | -/- Case pend | ling, DO NOT TR | AVEL | | | | | | | | |
| | | | | | | | | | | | | | |
| Personal | Nationality Immigration | Processes Forms | Dependents Sponsors | Education Employment | Financial Misc | Travel Visa Status | OnDoc Notes | s ▼ | FN Billing ▼ | Case Overview | | | |
| Activities | AOS Family | | Renam | e Process | Add Proc | ess | | | | | | | |
| View: | signment | Forms | equired Docs | D _{Questionna} | ire 🗁 Act | ivities 🗅 Re | <u>ceipts</u> C | ⊔ <u>Inst</u> | tructions | ⊔ <u>OnDocs</u> | En Jobs | HR Info | |
| | | | | (1) | | | | (2 | \mathbf{D} | | | | |
| Activity Nam Description | ie | | т | arget Date | Da | te Completed | A | ssign | ed To | Rece | ipt | | |
| Date Openeo | 1 | | • | 02/12/2018 | 02 | 2/12/2018 | 🔛 R | leaume | e, Robert | •Sen | d Engagement Me | ssage | |
| Online Intak Date New Cas | e Date e is opene | | • | 02/13/2018 | 02 | 2/13/2018 | 🛗 R | leaume | e, Robert | •Sen Ser | d Welcome Messa nd Welcome E-Mai | ge I | |
| FN Question Electronic Que | naires Submitte estionnai | ed | • | 02/13/2018 | 02 | 2/13/2018 | 🖺 R | leaume | e, Robert | | | | |
| FN Question Electronic Que | naires Complete | ed | i | 02/16/2018 | 02 | 2/17/2018 | 🗰 R | leaume | e, Robert | | | | |
| Date I-130 F Approval Date | Petition Previou e of Previ | sly Approved | • | 02/16/2018 | 01 | /01/2016 | ₩ R | leaume | e, Robert | | | | |
| Date I-130 F Filing Date of | Petition Filed Co Concurr | ncurrently (O | ne-Step) | 02/16/2018 | Ħ | | # | Reaur | me Robert | T | | | |
| Affidavit of S | Support Support P Aff | idavit of Sup | port provided | d to Sponsor of | f I-864 | 3 | | Ime | e, Robert | | | | |
| All FN Docs | Received | | • | 02/21/2018 | 02 | 2/21/2018 | 🖺 R | leaume | e, Robert | | | | |
| Signed Affid Signed Affida | avit of Support vit of Su | Received | • | 02/28/2018 | 02 | 2/28/2018 | 🖺 R | leaume | e, Robert | | | | |
| AOS Applica Forms and Su | tion Prepared pporting D | | | 03/02/2018 | 03 | 3/02/2018 | 🗰 R | lodrigu | ez, Cynthia | | | | |
| AOS Applica Prepared and | tion Filed Signed AO | | • | 03/05/2018 | 03 | 3/05/2018 | 🗰 R | leaume | e, Robert | •Sen •DOL | d Application Filed Processing Times | <u>l Message</u> 2 | |
| Receipt Date | as Entere | | • | 03/14/2018 | 03 | 3/14/2018 | 🗰 R | leaume | e, Robert | | | USCIS | Upload |
| | | | | | | | | | | •Sen | d Receipt # Receiv | ved Message | |

1 Target Dates provide users with expected completion dates for each Activity.

2 The **Assigned To** column displays who is responsible for completing each Activity.

Activity Descriptions can be added to provide users with additional information.

Reporting

Enhanced Activities provide additional reporting capabilities by using the **Activities** data type when generating **Interactive** reports. Results can be filtered by date ranges, whether an Activity has been completed, who it's assigned to, and more. This provides an effectives means for determining past and future workloads, calculating processing times, and generating to-do lists for specific users.

| FN Full Name | Process Type Activity Name | | Activity Target Date | Activity Date Completed | Activity Assigned To |
|-------------------------|----------------------------|---|----------------------|-------------------------|----------------------|
| Abbott, James Vern [Cou | лт: 30] | | | | |
| Abbott, James Vern | AOS Family | Date Opened | 02/12/2018 | 02/12/2018 | Reaume, Robert |
| Abbott, James Vern | AOS Family | Online Intake Date | 02/13/2018 | 02/13/2018 | Reaume, Robert |
| Abbott, James Vern | AOS Family | FN Questionnaires Submitted | 02/13/2018 | 02/13/2018 | Reaume, Robert |
| Abbott, James Vern | AOS Family | FN Questionnaires Completed | 02/16/2018 | 02/17/2018 | Reaume, Robert |
| Abbott, James Vern | AOS Family | Date I-130 Petition Previously Approved | 02/16/2018 | 01/01/2016 | Reaume, Robert |

Configuring Enhanced Activities

Prior to incorporating Enhanced Activities into your organization's workflow, it is recommended that you review and customize the default Target Date and Activity Assignment settings found within **Administrative Settings** > **Processes** > **Activities**.

Note: If not already completed, organizations should also review and customize the activities in use by each process type, and the activity order, before attempting to customize Enhanced Activity settings.



Select the desired process and click Edit Process Activity Details.

| 🏛 Firm | n Adminis | tration / P | ocesses | ; | | | | | | | | |
|---|--|---------------------|------------|---------------------|------------------|--------------------|------------------------|------------------|-----------------|-------------|---|---------------------|
| | | | | | | | | | | | | Tutorial 🧳 Close |
| General | Notices | Addresses Phones | Users | Templates | Billing Setup | Processes | Divisions Companies | Custom Fields | Choice Lists | LLX Data | | |
| Process Ac | tivities | | | | | | | | | | | Refresh |
| View: Pro | cess 🗀 Rec | uired Documer | its 🔁 Ac | tivities <u>Def</u> | ault Questi | onnaires 🗀 🖸 | ustom Question | naires 🎦 Fo | orms 🗀 Pr | ocess Gro | φ. | |
| The lists be | elow allow yo | u to manage the | Activities | for each of your | Firm's proc | esses. | | | | | | |
| Firm's Act | tivities | | | | | | | | | | Process Activities (Group of Firm's Activities per process) | Print Activity List |
| Firm's Activities Sort • - Activity (options) Chicking either 'Sort' or 'Activity' will sort the data by that column 0010 - Date Opened (MFH) 0011 - 1st Additional Recruitment Step Placed (FH) 0011 - 1st Additional Recruitment Step Placed (FH) • 0013 - 2nd Sunday Ad Placed (FH) • 0014 - 2nd Sunday Ad Placed (FH) • 0015 - Srd Additional Recruitment Step Placed (FH) • 0015 - FN Rigible for DACA (FH) • 0016 - 45 Day Letter Sen (FH) • 0016 - 45 Day Letter Received (FH) • 0017 - 45 Day Letter Received (FH) • 0018 - 45 Day Letter Received (FH) • 0020 - Add Text Sent (FH) • | | | | | | | | | | | Firm/Company to undate Eirm Only Process AOS Family Sort - Activity (options) [days] 0010 - Date Opened (MFH) [0] 0014 - Online Intake Date (FH) [1] 0015 - FN Questionnaires Submitted (FH) [3] 0016 - FN Questionnaires Completed (FH) [3] 0017 - Date I-130 Petition Previously Approved (FH) [0] 0018 - Date I-130 Petition Filed Concurrently (One-Step) (FH) [0] 0020 - All FN Docs Received (FH) [1] 0020 - All FN Docs Received (FH) [1] 0021 - Sligned Affidavit of Support Received (FH) [5] 0022 - AOS Application Prepared (FH) [2] | |
| 0021 - Ad | 0019 - Ability to Pay Documentation Requested from Company (FH) 0020 - Ad Text Sent (FH) 0021 - Additional Motion Due Date (FH) Use Firm Activity -> Click to use the selected Firm Activities in the AOS Family process Dalate Firm Activity Click to Delete the selected Firm Activities | | | | | | AOS Family pro | cess | Ŧ | | 0024 - Receipt Date (RFH) [7] 0025 - Biometrics Appt. Date (FH) [10] 0026 - 1445 Receipt Date (FH) [0] 0027 - EAD Received (optional) (FH) [0] | |
| | Crea | te Firm Acti | vity ci | ick to Create a | new Firm Ac | tivitiy | | | | | Update Sort Order | |
| | Ed | it Firm Acti | vity Cl | ick to edit the F | irst selected | Firm Activity | | | | | Edit Process Activity Details | |
| | | Foggle FN V | iew ci | ick to set/clear | the FN viewa | bility of selecte | d Firm Activities | | | | Edit Expiration Linkage | |
| | 1 | oggle HR V | iew CI | ick to set/clear | the HR view | ability of selecte | d Firm Activities | | | | Delete Process Activity Select Process Activity to delete and click Delete Process Activity | |

Targets Days

The **Target Days** column will determine the Target Date of each Activity upon opening a new case. Enter in the number of days by which an Activity should be completed compared to the Activity that comes directly prior.

Values entered <u>do not</u> include weekends. Because of this, consider entering **5** instead of **7** when aiming to have an Activity completed within a week.

Entering a **0** will result in the Activity's Target Date being identical to the *prior* Activity. Use this when a group of Activities should be completed on the same day.

| Process: AOS Family | | | | | Sort By Activi | ty |
|---|---------------------------|--------|-------------|-----|--------------------|----|
| Activity | Description | \leq | Target Days | Def | ault Role | |
| Date Opened | | | 0 | Ca | ise Manager | ۲ |
| Online Intake Date | Date New Case is opened | * | 1 | Re | sponsible Attorney | ۲ |
| FN Questionnaires Submitted | Electronic Questionnaires | * | 0 | No | ot Assigned | • |
| FN Questionnaires Completed | Electronic Questionnaires | * * | 3 | No | ot Assigned | ۲ |
| Date I-130 Petition Previously Approved | Approval Date of | + | 0 | No | ot Assigned | ۲ |
| Date I-130 Petition Filed Concurrently (One- Step) | Filing Date of | * * | 0 | No | ot Assigned | ۲ |
| Affidavit of Support Sent to Sponsor | Affidavit of Support | * | 1 | No | ot Assigned | ۲ |
| All FN Docs Received | All Required Documents | * | 1 | No | ot Assigned | T |
| Signed Affidavit of Support Received | Signed Affidavit of | * | 5 | No | ot Assigned | ۲ |
| AOS Application Prepared | Forms and Supporting | * | 2 | No | ot Assigned | ٠ |
| ADD ADDITION FILM | Pronarod and Signad AOS | | 1 | | | - |

Note: Changes to Target Day values are <u>**not**</u> retroactive to processes already created.

Default Roles

The **Default Roles** column is used to assign an Activity to a specific user who is typically responsible for completing that Activity. The user assigned will be dependent on the **Case Assignments** for that particular process.

Assignments can be changed at any time from within a particular process, regardless of whether a default was defined.

Assigning default roles is an optional aspect of Enhanced Activities. If used, it provides an effective way to generate to-do lists for users, and to manage and forecast individual workloads.

| Edit Process Activity Details | | | | × |
|---|---------------------------|---------|------------|--------------------------------------|
| Process: AOS Family | | | | Sort By Activity |
| Activity | Description | Target | Days | Default Role |
| Date Opened | | 0 | | Not Assigned 🔹 |
| Online Intake Date | Date New Case is opened | ned 🧅 🛛 | | Not Assigned Responsible Attorney |
| FN Questionnaires Submitted | Electronic Questionnaires | | | Collaborating Attorney |
| FN Questionnaires Completed | Electronic Questionnaires | 3 | | Case Manager Paralegal |
| Date I-130 Petition Previously Approved | Approval Date of | 0 | | Not Assigned 🔻 |
| Date I-130 Petition Filed Concurrently (One- Step) | Filing Date of | 0 | | Not Assigned |
| Affidavit of Support Sent to Sponsor | Affidavit of Support | 1 | | Not Assigned 🔻 |
| All FN Docs Received | All Required Documents | 1 | | Not Assigned 🔻 |
| Signed Affidavit of Support Received | Signed Affidavit of | 5 | | Not Assigned 🔻 |
| AOS Application Prepared | Forms and Supporting | 2 | | Not Assigned 🔻 |
| ACC Application filled | 201 hanni? hae harenard | 1 | | NI_L A |
| | | U | pdate Info | Update and Return Cancel |

Note: Changes to Default Role assignments are <u>not</u> retroactive to processes already created.

Activity Description

The **Description** column is used to provide users with additional information on a particular Activity. The descriptions will be visible as pop-out windows under each Activity name, from the Activities page within a case.

Edge provides a variety of default descriptions for many Activities, while others are blank. Organizations may customize these descriptions as desired.

| Edit Process Activity Details | | | | | | | | | |
|---|-----------------------------------|--------|-------------|------------|-----------|----------|---|--|--|
| Process: AOS | Family | | D | Defeat | Sort By A | Activity | Î | | |
| Activity | | 1 | arget Days | Default | Role | | I | | |
| Date Opened | You have 255 characters remaining | |) | Not A | ssigned | V | ļ | | |
| Online Intake Date | Date New Case is opened | • | | Not A | ssigned | ¥ | | | |
| FN Questionnaires Submitted | Electronic Questionnaires | ÷ |) | Not A | ssigned | ¥ | | | |
| FN Questionnaires Completed | Electronic Questionnaires | ▲ ▼ | 3 | Not A | ssigned | ¥ | | | |
| Date I-130 Petition Previously Approved | Approval Date of | - - |) | Not A | ssigned | ¥ | | | |
| Date I-130 Petition Filed Concurrently (One-Step) | Filing Date of | ÷ |) | Not A | ssigned | • | | | |
| Affidavit of Support Sent to Sponsor | Affidavit of Support | • | | Not A | ssigned | ¥ | | | |
| All FN Docs | All Paquirad Documents | ▲ | 1 | | · · · · · | _ | • | | |
| | | | Update Info | Update and | Return | Cancel | | | |

Descriptions can be up to **255** characters long, including spaces.

Note: Changes to Activity Descriptions <u>are</u> retroactive to processes already created.

Working with Enhanced Activities

Once enabled for your Edge site, the **Activities** page will display additional columns for **Target Date** and **Assigned To**, as well as the Activity **Descriptions** under each Activity Name.

| ∎. FN | √Individual / | ' Abbott, Ja | imes Vern (| 123456789) | / Processe | es Forms | | | | | | | | |
|-----------------------------------|----------------------------|--------------------|----------------------------|-------------------------|-------------------|-----------------------|---------------------------|--------------------------|--|-----------------------|------------------|------------|------------------|-------|
| # 1234567 | 89) [AOS Family |] RJR/RJR/-/ | -/- Case pend | ing, DO NOT TR | AVEL | | | | | | | | | |
| | | | | | | | | | | | U | odate Info | Can | cel |
| Personal | Nationality Immigration | Processes Forms | Dependents Sponsors | Education Employment | Financial Misc | Travel Visa Status | OnDocs Notes ▼ | FN Billing ▼ | Case Overview | | | | | |
| Activities | AOS Family | ~ | Renam | e Process | Add Proc | ess | ~ | | | - | | | | |
| /iew: ∟ <u>A</u> | <u>ssignment</u> | Forms LIRe | quired Docs | Questionna | <u>aire</u> ⊯Act | tivities 🖾 <u>Rec</u> | eipts UIn | <u>istructions</u> l | J <u>OnDocs</u> ∐ <u>FN lobs</u> L | J <u>HR Info</u> | | Recalc T | arget Da | tes |
| Activity Nai Description | me | | | arget Date | Da | ite Completed | Assig | gned To | Receipt | Note (visible to F | View IR) FN/H | ٤ | Reminder Date | Audit |
| Date Opene | ۶d | | | 02/12/2018 | 0 | 2/12/2018 | Beaur | me, Robert | •Send Engagement Me | essage More | Y/Y | Required | ŧ | Ģ |
| Online Inta Date New Ca | ke Date ise is opene | | • | 02/13/2018 | ± | ji i | Rea | ume Robert | Send Welcome Messa Send Welcome E-Ma | age il More | Y/Y | [Delete] | ŧ | Ģ |
| N Question | nnaires Submitte | ad | • | 02/13/2018 | Ħ | l. | Rea | ume Robert | T | More | Y/Y | [Delete] | ŧ | Ģ |
| 1234567 | 89) [AOS Family |] RJR/RJR/-/ | -/- Case pend | ling, DO NOT TR | AVEL | | | | | | | odate Info | Car | cel |
| Personal | Nationality Immigration | Processes Forms | Dependents Sponsors | Education Employment | Financial Misc | Travel Visa Status | OnDocs Notes ▼ | FN Billing ▼ | Case Overview | | | | | |
| ctivities | AOS Family | | Rename | e Process | Add Proc | ess | | | | | | | | |
| iew: 🗅 <u>A</u> | <u>ssignment</u> | Forms 🗅 Re | quired Docs | Questionna | aire 🗁 Act | tivities 🗅 <u>Rec</u> | <u>ceipts</u> 🗅 <u>In</u> | <u>istructions</u> (| ⊃ <u>OnDocs</u> ⊂ <u>FN_Jobs</u> ⊂ | ⊐ <u>HR Info</u> | | Decels T | | |
| Activity Na | me | | Ta | arget Date | Da | ite Completed | Assig | gned To | Receipt | Note (vicible to k | View | Recall 1 | Reminder | Audit |
| ate Opene | ed. | ~ | • | 02/12/2018 | 02 | 2/12/2018 | Beaur | me, Robert | •Send Engagement Me | essage More | Y/Y | Required | * | |
| nline Inta ate New Ca | ke Date ase is opene | | • | 02/13/2018 | ± | ji ji | Rea | ume Robert | Send Welcome Messa | age iii | Y/Y | [Delete] | | Ç |
| N Question lectronic Qu | nnaires Sul | ectropic Que | | | | | | | Send welcome E-Ma | More | | | ŧ | • |
| | uescionnal Lie | ctronic Que | stionnaires Pr | rovided to Fore | eign Natior | nal Client | | ume Robert | Send welcome E-Ma | More | Y/Y | [Delete] | ** | • |
| N Question lectronic Qu | nnaires Complete | ed | stionnaires Pr | rovided to Fore | eign Natior | nal Client | Rea | ume Robert ume Robert | Send wercome E-Ma | More More | ү/ү | [Delete] | | |

Target Date

The Target Date provides a visual cue to users on the timeliness of each Activity.

Incomplete Activities with the green dot • have a Target Date of today or in the future.

Incomplete Activities with the red exclamation mark ¹ have a Target Date in the past.

| Personal Nationality Proc Immigration Form | esses Dependents Education ns Sponsors Employment | Financial Travel Misc Visa St | OnDocs atus Notes ▼ | FN Case Billing ▼ Overview | |
|---|--|----------------------------------|---------------------------|-------------------------------|--|
| ACTIVITIES AOS Family | Rename Process | Add Process | | | |
| new: <u>Assignment</u> <u>Forms</u> | | Taire Activities | <u>Receipts</u> <u>in</u> | | |
| Activity Name Description | Target D | ate Da | ate Completed | Assigned To | Receipt |
| Date Opened Date New Case is Opene | • 02/0 | 1/2018 | 2/01/2018 🛍 | Reaume, Robert | •Send Engagement Message |
| Online Intake Date Date New Case is opene | 02/0 | 1/2018 🛗 | Ħ | Reaume Robert 🔻 | •Send Welcome Message Send Welcome E-Mail |
| FN Questionnaires Submitted Electronic Questionnai | <u> </u> 02/0 | 1/2018 🛗 | Ħ | Not Assigned 🔹 |] |
| FN Questionnaires Completed Electronic Questionnai | • 02/0 | 6/2018 🛗 | Ħ | Not Assigned 🔻 | |

Once an Activity is marked **Completed** the green dot or red exclamation mark will remain, indicating whether or not the Activity was completed on time.

| Personal N Ir | Nationality Pr mmigration Fe | rocesses orms | Dependents Sponsors | Education Employment | Financial Misc | Travel Visa Status | OnDocs Notes ▼ | FN Billing ▼ | Case Overview | |
|---------------------------------------|---------------------------------|------------------|------------------------|-------------------------|-------------------|-----------------------|-------------------------------|-----------------|-----------------------|--|
| Activities AO | S Family | • | Rename | e Process | Add Proce | 55 | | | | |
| View: Assig | anment D _{Form} | ms 🗅 <u>Req</u> | uired Docs (| D <u>Questionna</u> | aire 🗁 Acti | vities 🗅 Reg | _{ceipts} 🗅 <u>In</u> | structions (| ⊔ _{OnDocs} □ | EN Jobs HR Info |
| | | | | | | | | | | |
| Activity Name Description | | | | Target Dat | te | Date Co | mpleted | Assig | ned To | Receipt |
| Date Opened Date New Case is | s Opene | | | • 02/01, | /2018 | 02/01, | /2018 🛗 | Reaun | ne, Robert | •Send Engagement Message |
| Online Intake D Date New Case is | Date s opene | | | 02/01/ | /2018 | 02/06, | /2018 🛗 | Reaun | ne, Robert | •Send Welcome Message Send Welcome E-Mail |
| FN Questionnai Electronic Questio | ires Submitted | | | 02/01/ | /2018 | 02/06, | /2018 🛗 | Not As | ssigned | |
| FN Questionnai Electronic Questio | ires Completed | | | • 02/06, | /2018 | 02/06, | /2018 🛗 | Not As | ssigned | |
| Date I-130 Peti Approval Date of | ition Previously I Previ | Approved | | • 02/07, | /2018 🛗 | | Ħ | Not | Assigned | T |
| Date I-130 Peti Filing Date of Con | ition Filed Concu | rrently (On | e-Step) | • 02/07, | /2018 🛗 | | H | Not | Assigned | T |

The Target Dates for incomplete Activities can be modified, as needed. This can be useful in situations where a certain step needs to be pushed back, when processing times fluctuate, etc.

| Activity Name Description | | Target Date | Date Completed | Assigned To | Receipt | Note (visible to HR) | View FN/HR | | Reminder Date | Audit |
|--|--------------------|----------------------|----------------|--------------------|---|-------------------------|---------------|----------|------------------|-------|
| Date Opened | | • 01/01/2018 | 01/01/2018 🛗 | Reaume, Robert | •Send Engagement Message | More | Y/Y | Required | ŧ | Ģ |
| Online Intake Date Date New Case is opene | | • 01/03/2018 | 01/03/2018 🔛 | Reaume, Robert | Send Welcome Message Send Welcome E-Mail | More | Y/Y | [Delete] | ŧ | Ģ |
| FN Questionnaires Submit Electronic Questionnai | ted | • 01/03/2018 | 01/03/2018 🛗 | Reaume, Robert | | More | Y/Y | [Delete] | ŧ | Q |
| FN Questionnaires Comple Electronic Questionnai | eted | • 01/08/2018 | 01/08/2018 🛍 | Reaume, Robert | | More | Y/Y | [Delete] | ŧ | Ģ |
| Date I-130 Petition Prev Approval Date of Previ | AOS Application I | Prepared | | 01/22/2018 | 02/11/2018 | Bodriguez, C | ynthia | | ŧ | Ģ |
| Date I-130 Petition File Filing Date of Concurr | | | | - | | | | | ŧ | Ģ |
| Affidavit of Support Ser Affidavit of Support p | Prepared and Signe | ed AO | | 02/12/201 | 18 🗒 🔤 | Reaume F | lobert | • | ŧ | Ģ |
| All FN Docs Received All Required Documents | Receipt Date | tere | | 02/22/201 | 18 🛍 👘 | Reaume F | Robert | • | ŧ | Ģ |
| Signed Affidavit of Support Signed Affidavit of Su | Receipt Date as En | - | | | | nore | | | ŧ | Ģ |
| AOS Application Prepared Forms and Supporting D | | 01/22/2018 | 02/11/2018 🛗 | Rodriguez, Cynthia | | More | Y/Y | [Delete] | ŧ | Ģ |
| AOS Application Filed Prepared and Signed AO | (| <u>101/23/2018</u> ¥ | ¥ | Reaume Robert 🔻 | Send Application Filed Message DOL Processing Times | More | Y/Y | [Delete] | ŧ | Ģ |
| Receipt Date Receipt Date as Entere | | 02/01/2018 | ¥ | Reaume Robert 🔻 | USCIS V Uploa | <u>More</u> | Y/Y | [Delete] | ŧ | Ģ |
| | | | | | Send Receipt # Received Message | | | | | |
| Biometrics Appt. Date Notice of Biometric Ap | | • 02/15/2018 🔛 | Ш | Not Assigned 🔹 | •Send Message: Biometrics Appt Date | More | Y/Y | [Delete] | ŧ | Ģ |

Once a Target Date has been modified, users must click either the **Update Info** button <u>OR</u> the **Recalc Target Dates** button.

Update Info will save the new Target Date but will not make adjustments to any other Activities. **Recalc Target Dates** will push back the Target Dates for all *incomplete* Activities *after* the Activity being modified.

Target Dates for prior Activities or completed Activities will not be adjusted.

| | | | Update | ncel | | | | | | |
|-------------------|----------------------------|-------------------------|---------------|------------------|-------|--|--|--|--|--|
| Case Overview | | | | | | | | | | |
|] <u>OnDocs</u> 🗀 | I <u>FN lobs</u> CIHR Info | | Reca | Ic Target Da | ates | | | | | |
| ≥d To | Receipt | Note (visible to HR) | View FN/HR | Reminder Date | Audit | | | | | |
| , Robert | •Send Engagement Message | More | Y/Y Required | ŧ | Ģ | | | | | |
| , Robert | •Send Welcome Message | | Y/Y [Delete] | ŧ | Ģ | | | | | |

Activity Assignment

The **Assigned To** column is used to assign an Activity to a specific user who will be responsible for completing that Activity.

Assignments for incomplete Activities can be changed at any time from within a particular process, regardless of whether a default was defined from the **Administrative Settings**.

All users will be available for assignment, even if they are not directly assigned to the process.

| FN/Individual / Al | bbott, James Vern (1 | 123456789) / Process | es Forms | | | | | |
|---|---------------------------------------|--|------------------------|-------------------|-----------------|---------------------------|--|--|
| (A# 123456789) [AOS Family] RJ | JR/RJR/-/-/- Case pend | ing, DO NOT TRAVEL | | | | | | |
| | | | | | | | | |
| Personal Nationality Immigration Fe | rocesses Dependents forms Sponsors | Education Financial Employment Misc | Travel Visa Status | OnDocs Notes ▼ | FN Billing ▼ | Case Overview | | |
| Activities AOS Family View: CAssignment CFor | Rename | e Process Add Proc | cess tivities 🗀 Rei | ceipts 🗀 In | structions [| □OnDocs | | |
| | | | | | | | | |
| Activity Name Description | | Target Date | Date Co | mpleted | Assig | ned To | Receipt | |
| Date Opened Date New Case is Opene | | • 02/06/2018 | 02/06 | /2018 🛗 | Reaun | ne, Robert | •Send Engagement Message | |
| Online Intake Date Date New Case is opene | | • 02/07/2018 🔛 | | 畄 | Real | ime Robert Assigned | Send Welcome Message Send Welcome E-Mail | |
| FN Questionnaires Submitted Electronic Questionnai | | • 02/07/2018 | | | Herr Real | iandez Trai ime Robert | ner | |
| FN Questionnaires Completed Electronic Questionnai | | • 02/12/2018 🔛 | | 畄 | Rod Not | riguez Cynt Assigned | hia ▼ | |

Activity Descriptions

If defined from the **Administrative Settings**, full descriptions for each Activity can be viewed by hovering the mouse cursor over the portion of the description shown directly under the Activity name.

| EN/Indivi | FN/Individual / Abbott, James Vern (123456789) / Processes Forms | | | | | | | | | | | | | | |
|--|---|------------------------|--|-------------------|-----------------------|-------------------|--|-----------------------------|------------------|----------------|---------------|-------------------|----------------------------------|------------------|-------|
| (A# 123456789) [AOS | A# 123456789) [AOS Family] RJR/RJR/-/-/- Case pending, DO NOT TRAVEL | | | | | | | | | | | | | | |
| | | | | | | | | | | | | Up | date Info | Can | cel |
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| Date Opened | | | 02/12/2018 | 02 | /12/2018 | Reaur | me, Robert | •Send En | gagement Message | Mo | re | Y/Y | Required | ŧ | Ģ |
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| Date New Case is open | ne | • | 02/13/2018 | iii i | <u>li</u> | Rea | ume Robert | ▼ Send W | /elcome E-Mail | Mo | re | Y/Y | [Delete] | Ē | Ģ |
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Additional Support

If you're an existing Edge user and have any additional questions about the setup process or the use of **Enhanced Activities**, or would like to have the feature enabled for your site, please reach out the LawLogix Customer Support team.