

# HR Portal

## Employee Dashboard

### Feature Walkthrough

#### A concise Employee and Case Summary Page

- The new Employee Dashboard is a powerful single page overview of an Employee profile.
- The re-designed layout surfaces key data points without the need for navigating through a complex interface
- Each active matter can be viewed alongside relevant employee, family and business information.
- Key points of information regarding the employee, the case in process and the business are accessible at a single glance

#### Activation

- Activation of the Employee Dashboard is being released as an optional upgrade beginning December 2023.
- Upon release, Firms will have the ability to enable the new employee dashboard on a Company by Company basis. The new dashboard will initially be released as “Off”. Activating the feature will enable the new dashboard at the next login by any HR user linked to that Company. The option to activate this feature will be located on the General tab for each respective Company.
- Starting mid April 2024 the legacy HR Employee Status page will be retired in favor of this new Employee Dashboard.

# SPECIFICATIONS

## Permissions and Settings

- Firm Admin level and HR permission settings are supported in the new Employee Dashboard
- Activation of the Employee Dashboard:
  - Access from the Company Module/General Tab
    - Enable new Dashboard to HR: "Yes"
      - By default the setting will be "No"

The screenshot displays the 'Company Info' tab for a company named 'Software Technology'. The interface includes a left-hand menu with options like 'Consultations', 'Billing', 'Expirations', 'Calendars', 'Dashboard', 'FN/Individual', 'Case Notes', 'Address Book', 'Reminders', 'Company', 'Reports', and 'History'. The main content area shows various fields for company information, including Company Number, Name, Short Name, Branch Name, NAICS Code (5411), External Firm (ELF Normal), Primary R.A., and Company Web Site. A dropdown menu for 'HR Case Request/Default Case Mgr' is open, listing several users with status indicators: (\*) Cisneroz, Joshua TheRed (Assigned), (\*) Grundy, Steve (Assigned), (-) A, ELF1 (Not Assigned), (-) A, ELF2 (Not Assigned), (-) A, NON ELF (Not Assigned), (-) Administrator, Security (Not Assigned), (-) Al-Zuheiri, Hassan (Not Assigned), (-) asda (Not Assigned), (-) Basic User (Not Assigned), (-) Bejar, Christen (Not Assigned), (-) Benitez, Angel (Not Assigned), (-) Calderon Testing, Betina (Not Assigned), (-) Calendar, Joint (Not Assigned), (-) Case Manager, First CM Middle CM (Not Assigned), and (-) Chavez, Fidel Castro (Not Assigned). Below the user list are 'Assign Users' and 'Revoke Users' buttons. Further down, there are dropdowns for 'Default Company Contact', 'Default Company Signer', 'FN Summary Template', 'FN Welcome Template', 'HR Request Template', and 'HR Welcome Template'. A series of radio buttons allow for setting permissions for HRs, such as 'Questionnaire Locked', 'Show HR Info to HRs', 'Disallow HR to view FN SSN', 'Allow HRs to edit questionnaires', 'Hide Dependents from HR Report', 'Enable Old Document Upload', 'Hide Content from FN', 'Enable Special Instruction flag for HR', 'Allow HR to view Document Custom Folders', 'Show incomplete Activities to HR', 'Show incomplete Activities to FN', 'Show FN Dashboard on Login', 'Allow MFA for all FN', and 'Require MFA for HR login'. At the bottom, a highlighted box contains the setting 'Enable new dashboard to HR:  Yes  No'.

To enable this Company to Create a New Case Request, select a default Case Manager. To select more than 1 user, hold down the Control Key (PC) or Command Key (Mac) and click on each desired user. You can also use the Shift key to select a range of users.  
**Key:** (-) = Not Assigned, (\*) Assigned

The FN Summary Template selected will be used to generate summary pages viewable by FNs and HRs for this Company.  
The FN Welcome Template selected will be used to generate welcome e-mails for FNs petitioned by this Company.  
The HR Request Template selected will be used when HR requests a new Case or Process.  
The HR Welcome Template selected will be used to generate welcome e-mails for HRs working for this Company.

## Accessing the Employee Dashboard

HR users will be able to access the Employee Dashboard page as part of their current workflow in the HR Portal. Searching and navigating to an employee profile remains unchanged.

Searching for an Employee displays a listing of employees and all visible processes for the Employees.

The screenshot displays the HR Portal interface. At the top, there is a search bar containing 'Software Technology' and user information for 'Ralph Georges'. A search for 'grijalva' is active, showing 0 hidden results. The main content area is titled 'Dashboard > Employee Status' and features a table of employee records. The table has columns for Employee ID, Name, Process, E-mail, Job Location, Case Opened, and Case Closed. Three records are listed for 'Grijalva, Montel Middle' with processes: Labor Cert PERM, AOS Family, and H-1B Professional. Below the table, a detailed view for the selected employee is shown, including Employee Details (Current Status: H-1B, Country of Birth: ECUADOR, Case Number: 1603-1275028494 H-1B Professional, Case Manager: Jacob-Firm User Verburg, Department: 1, Manager: Man ManagerPrimary), HR - Missing Documents (Articles of Incorporation, Bank Letter, Company Information/Financials), HR - Signature Required (I-129, I-129H), and Upcoming Expirations (Global Work Status: 01/15/2024, I-797: 03/15/2025, Passport: 04/15/2025). A 'View Employee Dashboard' button is located at the bottom right of the details section. The footer shows 'Items per page 25' and navigation controls.

Employee ID	Name	Process	E-mail	Job Location	Case Opened	Case Closed
9001-D.E.L.	Grijalva, Montel Middle	Labor Cert PERM	MontelFNDemo@Googl...	Default Locati...	09/10/2019	
9001-D.E.L.	Grijalva, Montel Middle	AOS Family	MontelFNDemo@Googl...	Default Locati...	06/07/2022	
9001-D.E.L.	Grijalva, Montel Middle	H-1B Professional	MontelFNDemo@Googl...	Default Locati...	12/14/2022	

**Employee Details**  
Current Status: **H-1B**  
Country of Birth: **ECUADOR**  
Case Number: **1603-1275028494 H-1B Professional**  
Case Manager: **Jacob-Firm User Verburg**  
Department: **1**  
Manager: **Man ManagerPrimary**

**HR - Missing Documents**  
Articles of Incorporation  
Bank Letter (or last month's statement)  
Company Information/Financials

**HR - Signature Required**  
I-129  
I-129H

**Upcoming Expirations**  
Global Work Status: 01/15/2024  
I-797: 03/15/2025  
Passport: 04/15/2025

[View Employee Dashboard](#)

Selecting either the Employee Name or the “View Employee Dashboard button” in any row, will take the User to the Employee Dashboard for the selected process.

# Layout and function of the Employee Dashboard page

The Employee Dashboard summarizes Employee and case data on a single concise display. Each subsection of information is arranged into logical groupings on "Cards".

Help Ralph Georges Messages Logout

Dashboard > Employee Status > Grijalva, Montel Middle

**Grijalva, Montel Middle**

Case Number: 1603-1275028494 H-1B Professional

**Nationality:** Ecuador & Argentina

**Country of Birth:** ECUADOR

**Country of Citizenship:** ECUADOR

**NIV Max Out Date:** 08/01/2029

**Employee Email:** MontelFNDemo@Google.com

**Employee Phone:** 555-555-555

**Case Manager:** Jacob-Firm User Verburg

**Employee ID:** 9001-D.E.L.

**Date of Birth:** 04/15/1960

**Current Status:** H-1B

[View HR Information](#)

**Forms for Review**

Forms	Reviewed
I-129	<input type="checkbox"/>
I-129H	<input type="checkbox"/>

**Shared Documents**

Questionnaire_1500526423.pdf	<a href="#">Download</a>
I-765.pdf	<a href="#">Download</a>

**Job Description**

**Company:** Software Technology

**Job Title:** Design and Innovation Leadership

**Wages:** \$123,450.00 Year

**Job Supervisor:** Dr. Malcom Neutronium

**Job Location:** Mountain Fortress/141 Peak Place, Aspen, Colorado

[View All Job Information](#)

**Visa Priority**

**November 2023**

**Visa Priority Date:** 11/06/2020

**Final Action Date:** Current

**Dates For Filing:** Current

**Preference Category:** Emp: 1st

**Final Action:** Eligible (Not Changed)

**Dates For Filing:** Eligible (Not Changed)

**Upcoming Expirations**

- Global Work Status**  
01/15/2024
- I-797**  
03/15/2025
- Passport**  
04/15/2025

[View All](#)

**Recent Activity**

Activity	Date Completed	Receipt Number
LCA Filed	11/06/2023	
Ed Eval Received	10/25/2023	
Ed Eval Submitted	09/25/2023	

[View All Activity](#)

**Required Documents**

Document	Size	Date	Actions
Articles of Incorporation			<a href="#">Download</a>
Bank Letter (or last month's statement)			<a href="#">Download</a>
Customer Reported Issues (Jira) (1).csv	19.85 KB	09/13/2023	<a href="#">Download</a> <a href="#">Refresh</a>
Company Information/Financials			<a href="#">Download</a>
Testfile.txt	4.12 KB	07/13/2023	<a href="#">Download</a> <a href="#">Refresh</a>

[View All Required Documents](#)

**Employee Dependents**

**Grijalva, Spouse**

**Relationship:** Spouse

**Birth Country:** Mexico

**Citizenship:** Mexico & Ecuador

**Status:** H-4

**Grijalva, Myron**

**Relationship:** Child

**Birth Country:** ECUADOR

**Citizenship:** ECUADOR

[View All Dependents](#)

**Employee Submitted Document(s)**

Document	Date Uploaded
Beneficiary's Passport ID Page	
Detailed Resume <a href="#">borders.png</a>	10/11/2022
Diplomas or Degrees <a href="#">Diploma.jpg</a>	09/13/2023

[View All Documents](#)

**Submitted Questionnaire(s)**

11/01/2023

- [Personal Information](#)
- [Parent 1](#)
- [Parent 2](#)
- [Your Current Spouse](#)
- [Information About Your Children](#)

[View All Questionnaires](#)

**Education History**

Institution	Degree	Graduated
Kosmos	MS - Applied Physics	01/15/2005
Engineering School	M.C.S.	04/15/2003
Science Institute	B.S.E.	09/01/1999

**Employment History**

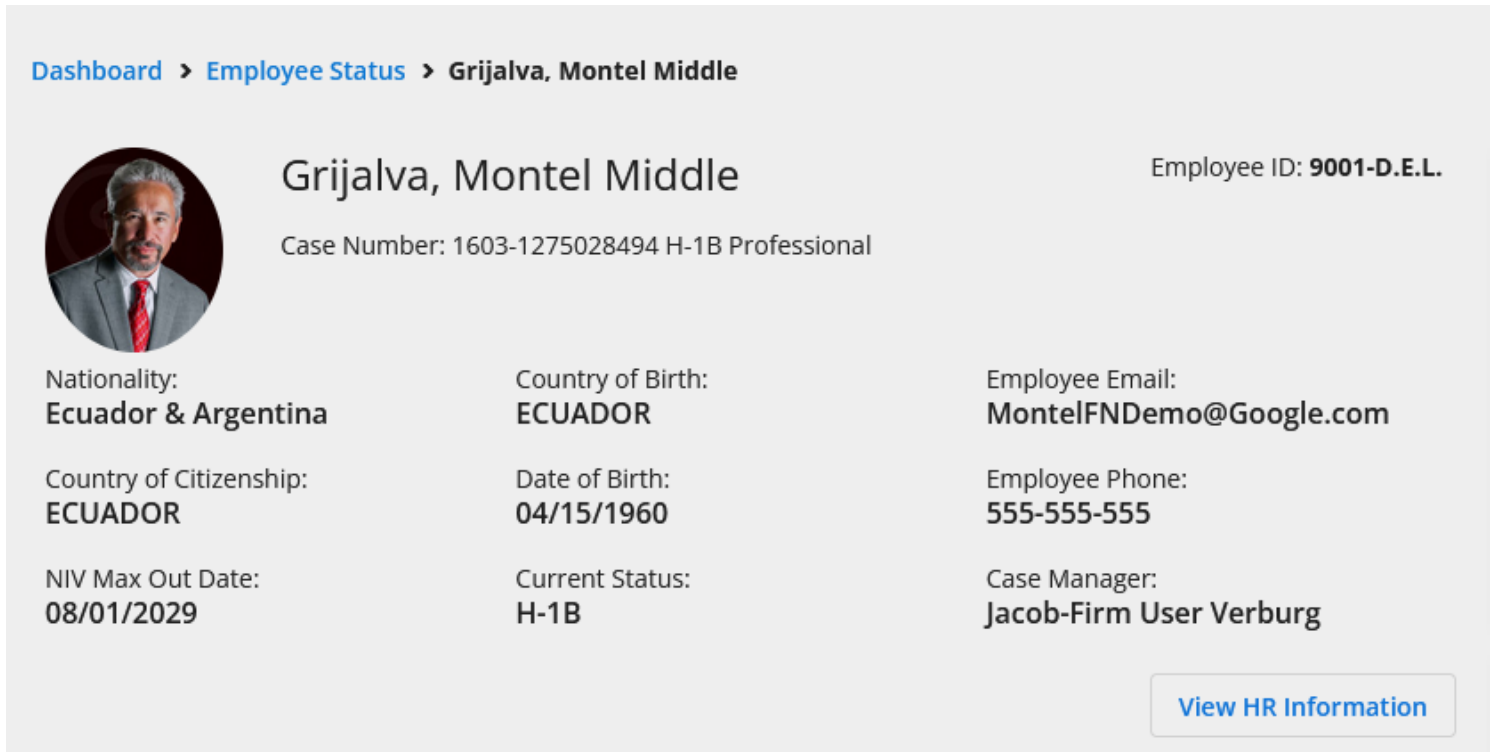
Employer	Job Name	Begin Date/End Date
Malcontents Science and Discovery	Lead Scientific Product Designer	04/15/2020/ Present
AAA Travel Science Test*	Science Product Engineer	04/16/2014/04/16/2016
Science Product Factory	Head Designer of Scientific Products	03/15/2014/05/30/2019

[View All](#)

The **Employee Card** surfaces data points about the Employee including:

- Name
- Case Number and Process Type
- Employee ID (If entered)
- DOB and Nationality Information
- Current Status & NIV Max Out date

[Dashboard](#) > [Employee Status](#) > **Grijalva, Montel Middle**



**Grijalva, Montel Middle** Employee ID: **9001-D.E.L.**  
Case Number: 1603-1275028494 H-1B Professional

**Nationality:**  
Ecuador & Argentina

**Country of Birth:**  
ECUADOR

**Employee Email:**  
MontelFNDemo@Google.com

**Country of Citizenship:**  
ECUADOR

**Date of Birth:**  
04/15/1960

**Employee Phone:**  
555-555-555

**NIV Max Out Date:**  
08/01/2029

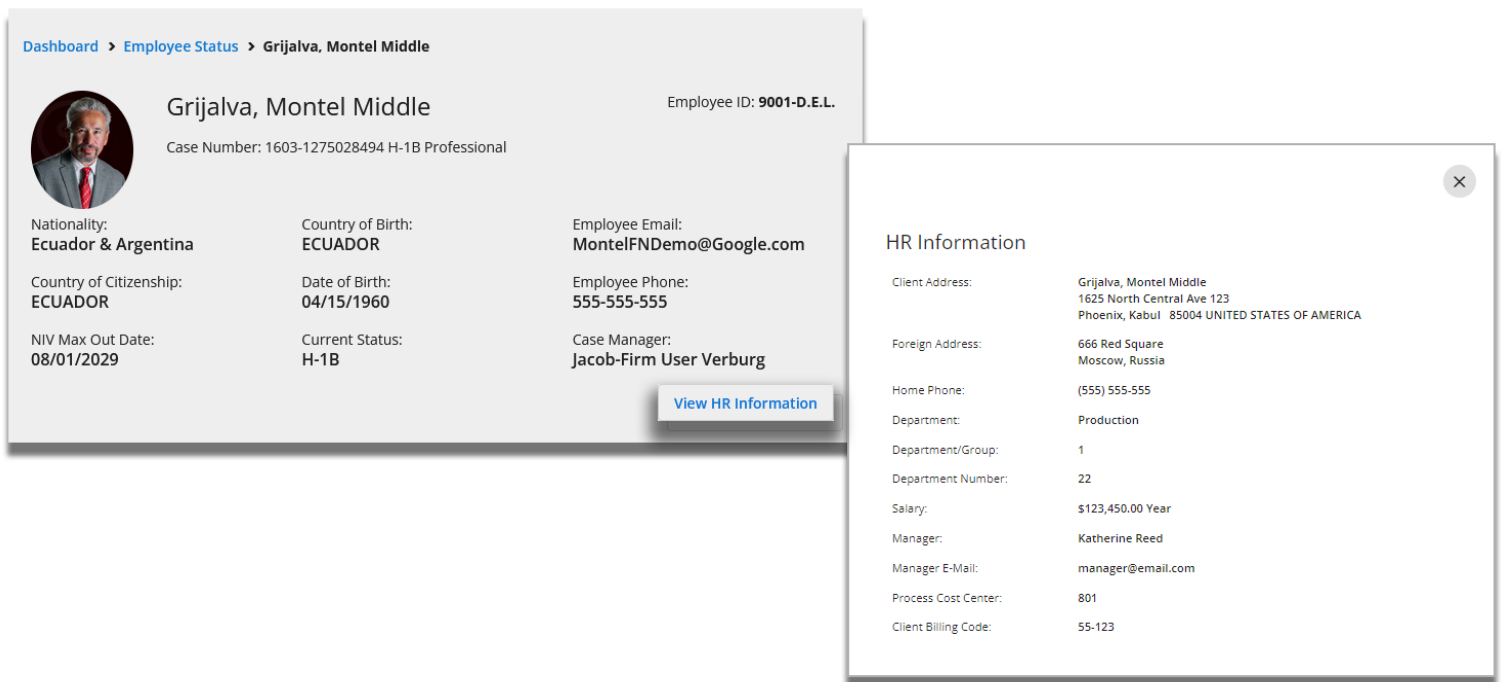
**Current Status:**  
H-1B

**Case Manager:**  
Jacob-Firm User Verburg

[View HR Information](#)

The **View HR Information** Button will open a secondary card with an expanded set of information about the employee from the “Management Info” section of the employee profile. The “View” button is accessible to the HR based on assigned Privileges from the Administrator.

[Dashboard](#) > [Employee Status](#) > **Grijalva, Montel Middle**



**Grijalva, Montel Middle** Employee ID: **9001-D.E.L.**  
Case Number: 1603-1275028494 H-1B Professional

**Nationality:**  
Ecuador & Argentina

**Country of Birth:**  
ECUADOR

**Employee Email:**  
MontelFNDemo@Google.com

**Country of Citizenship:**  
ECUADOR

**Date of Birth:**  
04/15/1960

**Employee Phone:**  
555-555-555

**NIV Max Out Date:**  
08/01/2029

**Current Status:**  
H-1B

**Case Manager:**  
Jacob-Firm User Verburg

[View HR Information](#)

### HR Information

**Client Address:** Grijalva, Montel Middle  
1625 North Central Ave 123  
Phoenix, Kabul 85004 UNITED STATES OF AMERICA

**Foreign Address:** 666 Red Square  
Moscow, Russia

**Home Phone:** (555) 555-555

**Department:** Production

**Department/Group:** 1

**Department Number:** 22

**Salary:** \$123,450.00 Year

**Manager:** Katherine Reed

**Manager E-Mail:** manager@email.com

**Process Cost Center:** 801

**Client Billing Code:** 55-123

The **Process selection** dropdown will permit the HR to navigate between open matters in place for the employee. Relevant information from the various cards will update based on the selected process type.

[Dashboard](#) > [Employee Status](#) > **Grijalva, Montel Middle**



**Grijalva, Montel Middle**

Case Number: 1603-1275028494 H-1B Professional

Employee ID: **9001-D.E.L.**

Nationality:  
**Ecuador & Argentina**

Country of Birth:  
**ECUADOR**

Employee Email:  
**MontelFNDemo@Google.com**

Country of Citizenship:  
**ECUADOR**

Date of Birth:  
**04/15/1960**

Employee Phone:  
**555-555-555**

NIV Max Out Date:  
**08/01/2029**

Current Status:  
**H-1B**

Case Manager:  
**Jacob-Firm User Verburg**

[View HR Information](#)

Process

Open Processes

**H-1B Professional \***

Labor Cert PERM

The **Job Description** card will display a summary of information about the position for the employee. Using the **View all Job Information** button will open a secondary card with additional information about the job. The data presented on these cards is taken from the **FN job information** associated with the selected Process.

The image shows a user interface for viewing job information. At the top, there is a 'Process' dropdown menu set to 'H-1B Professional \*'. Below this is a 'Job Description' card with the following details:

- Company:** Software Technology
- Job Title:** Design and Innovation Leadership
- Wages:** \$123,450.00 Year
- Job Supervisor:** Dr. Malcom Neutronium
- Job Location:** Mountain Fortress/141 Peak Place, Aspen, Colorado

A 'View All Job Information' button is located to the right of the Job Description card. Clicking this button opens a secondary card with the following detailed information:

- Company:** Software Technology
- Job Title:** Design and Innovation Leadership
- Wages:** \$123,450.00 Year
- Job Supervisor:** Dr. Malcom Neutronium
- Job Location:** Mountain Fortress/141 Peak Place, Aspen, Colorado
- Manager:** Katherine Reed
- Manager Id:** 901
- Manager e-mail:** manager@email.com
- Department:** Production
- Department Number:** 22
- Department Group:** 1

The **Visa Priority** card displays visa bulletin information being tracked by the firm for the employee. The latest monthly Visa bulletin information will be displayed with the employee's Priority date, and preference Category.

Alongside the Visa Priority card is the **Upcoming Expirations** card. This card will display any upcoming expirations tracked by the firm. The expirations will display the most immediate expiration types first followed by future expiration dates listed in date order. Clicking on **View all** gives an overview of all future expiration dates being tracked for the employee. (Past expirations are not displayed).

## Visa Priority

November 2023

**Visa Priority Date:** 11/06/2020

Final Action Date: Current

Dates For Filing: Current

**Preference Category:** Emp: 1st


Final Action: Eligible (Not Changed)

Dates For Filing: Eligible (Not Changed)

## Upcoming Expirations

 **Global Work Status**

01/15/2024

 **I-797**

03/15/2025

 **Passport**

04/15/2025

[View All](#)



The **Employee Dependents** card displays a subset of information regarding the Employees dependents. Clicking on the “View All Dependents” card will open a secondary page to show a full list of the employee’s dependents.

## Employee Dependents

### Grijalva, Spouse

<b>Relationship:</b>	Spouse
<b>Birth Country:</b>	Mexico
<b>Citizenship:</b>	Mexico & Ecuador
<b>Status:</b>	H-4

### Grijalva, Myron

<b>Relationship:</b>	Child
<b>Birth Country:</b>	ECUADOR
<b>Citizenship:</b>	ECUADOR

[View All Dependents](#)

The **Education History** card displays information regarding the employees educational history as collected by the Firm. The records will display in a “most recent first” order. If the employee has education records that extend beyond the three most recent, a “**View All**” button will appear to allow access to an extended page listing all of the education records collected.

## Education History

<b>Institution</b>	<b>Degree</b>	<b>Graduated</b>
Kosmos	MS - Applied Physics	01/15/2005
Engineering School	M.C.S.	04/15/2003
Science Institute	B.S.E.	09/01/1999

The **Employment History** card displays information regarding the employees employment history as collected by the Firm. The records will display the three “most recent” records first. If the employee has employment records that extend beyond the three most recent, a “**View All**” button will appear to enable access to an extended page listing all of the employment records collected.

The screenshot shows a user profile for Grijalve, Myron, with details on citizenship (Mexico & Ecuador), status (H-4), and education history. The main focus is the 'Employment History' card, which contains the following data:

Employer	Job Name	Begin Date	End Date
Malcontents Science and Discovery	Lead Scientific Product Designer	04/15/2020	Present
AAA Travel Science Test*	Science Product Engineer	04/16/2014	04/16/2016
Science Product Factory	Head Designer of Scientific Products	03/15/2014	05/30/2019

A 'View All' button is located at the bottom of the card.

**Forms for Review** presents a listing of forms prepared by the firm for review by the HR user. Forms may be downloaded by the HR user and marked as “Reviewed” to indicate that they have “Reviewed” the form. The Reviewed notification will appear on the forms page under the “HR” Sig Column. The **Shared Documents** card provides a location for sharing of documents relevant to the selected immigration process. Documents enabled for sharing by the firm may be downloaded from this card.

The screenshot displays two cards. The 'Forms for Review' card contains the following table:

Forms	Reviewed	
I-129	<input type="checkbox"/>	↓
I-129H	<input type="checkbox"/>	↓

The 'Shared Documents' card lists the following documents:

- Questionnaire\_1500526423.pdf (Download icon)
- i-765.pdf (Download icon)

The **Recent Activity** card will display the most recent activities and their completion dates. Any Receipts attached to the Activity will also display and provide a means for checking case status. The display for the primary card will show the three most recent activities. Clicking on **“View All Activity”** will display a full view of activities related to the selected process.

Recent Activity

Activity	Date Completed	Receipt Number
LCA Filed	11/06/2023	
Ed Eval Received	10/25/2023	
Ed Eval Submitted	09/25/2023	

[View All Activity](#)

Recent Activity

Activity	Date Completed	Receipt Number
Receipt Date	11/16/2023	WAC2212345678 <a href="#">Copy Receipt Number and go to Lookup</a>
LCA Filed	11/06/2023	
Ed Eval Received	10/25/2023	
Ed Eval Submitted	09/25/2023	
Prevailing Wage Received	08/25/2023	
Prevailing Wage Submitted	07/25/2023	
All Petitioning Company Docs Received	06/25/2023	
All FN Docs Received	05/25/2023	
All Petitioning Company Info Received	04/25/2023	
FN Questionnaires Completed	03/25/2023	

### Checking Case Status:

A shortcut to check the latest status regarding a receipt (USCIS) is provided for receipts entered into the Activities page. Clicking on the **“Copy Receipt Number and go to lookup”** button will copy the Receipt number into clipboard and automatically open the USCIS **“Case Status Online”** page. Right click in the Receipt number field and Paste the receipt number into the field. Click on **Check Status** to get the latest status information from USCIS.

Recent Activity

Activity	Date Completed	Receipt Number
Receipt Date	11/16/2023	WAC2212345678 <a href="#">Copy Receipt Number and go to Lookup</a>

**Case Status Online**

**Check Case Status**

Use this tool to track the status of an immigration application, petition, or request.

The receipt number is a unique 13-character identifier that consists of three letters and 10 numbers. Omit dashes (“-”) when entering a receipt number. However, you can include all other characters, including asterisks (“\*”), if they are listed on your notice as part of the receipt number. When a receipt number is entered, the check status button will be enabled and you can check the status.

Enter a Receipt Number

WAC2212345678








[Check Status](#)

Already have an Account? [Log In](#)

Create an Account? [Sign Up](#)

[DHS PRIVACY NOTICE](#)

**Required Documents** provides a listing of the documents needed by the law firm to complete the selected process underway. Documents may be uploaded directly from this page and downloaded as necessary by the HR user. HR users can also add supplementary documents and may replace previously uploaded documents with a new version using the provided icons. *(Please note- replaced docs will be removed from view but maintained within client OnDocs for management by the Firm)*. **“View all Required Documents”** will provide an expanded listing of all required documents.

Required Documents					
Document					
Articles of Incorporation					
Bank Letter (or last month's statement)					
Copy of Bank Letter.docx	11.59 KB	11/14/2023			
Company Information/Financials					
Company Financials.docx	11.59 KB	11/14/2023			

[View All Required Documents](#)

Explanation of the **Required Documents** Icons:



- **Upload** enables the adding of **Required documents** via the document upload screen
- **Download** provides the ability to download the selected documents
- **Replace file** will allow the uploading of a new document in place of a previously uploaded **Required document**
  - *(Please note- replaced documents will be removed from view but maintained within the system for management by the Firm)*.
- **Add Supplementary Document** will permit the uploading of supporting documents to a previously uploaded **Required Document**

**Employee Submitted Documents** and the **Submitted Questionnaire(s)** view provides the HR with insight into information submitted by the employee regarding the selected process.

Clicking on Employee submitted **Document Names** will provide the user with the ability to download the selected document. The default listing will show the document listing in the firm defined listing order. Selecting “View All Documents” will open an expanded listing.

## Employee Submitted Document(s)

Document	Date Uploaded
Beneficiary's Passport ID Page	
Detailed Resume	
<a href="#">borders.png</a>	10/11/2022
Diplomas or Degrees	
<a href="#">Diploma.jpg</a>	09/13/2023

[View All Documents](#)

Clicking on the **Submitted Questionnaire** title will enable the HR user to view the information submitted by the employee as part of their completed **Questionnaire** submission. This information will display in a new window.

## Submitted Questionnaire(s)

11/01/2023

[Personal Information](#)

[Parent 1](#)

[Parent 2](#)

[Your Current Spouse](#)

[Information About Your Children](#)

[View All Questionnaires](#)

[Dashboard](#) > [Employee Status](#) > [Grijalva, Montel Middle](#) > [Personal Information Questionnaire](#)

### Information About You

Family Name(s): Grijalva

First Name: Montel

Middle Name(s): Middle

Gender: Male

### Marital Status

### Nationality & Birth

Date of Birth (mm/dd/year): 04/15/1960

City or Town of Birth: Jablinska

Country of Birth: ECUADOR

Birth State/Province: Kreblinsky

Nationality(ies): Ecuador & Argentina

Country(ies) of Citizenship: ECUADOR

### More Information About You

A-Number (if any): 123456789

Current Visa or Immigration Status: H-1B

Date Status Expires (mm/dd/yyyy): 04/15/2025