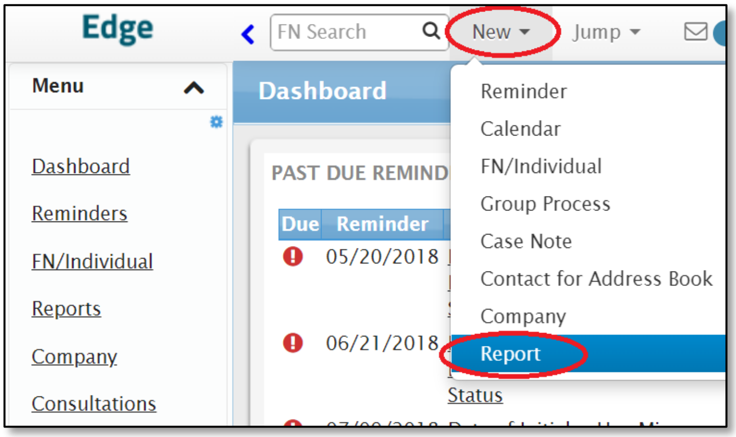
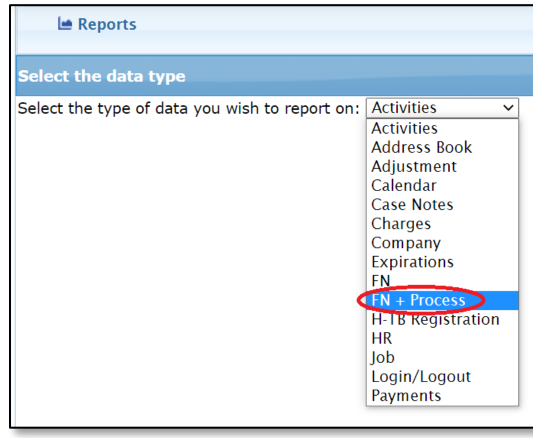
EQUIFAX | Workforce Solutions

Immigration Case Management

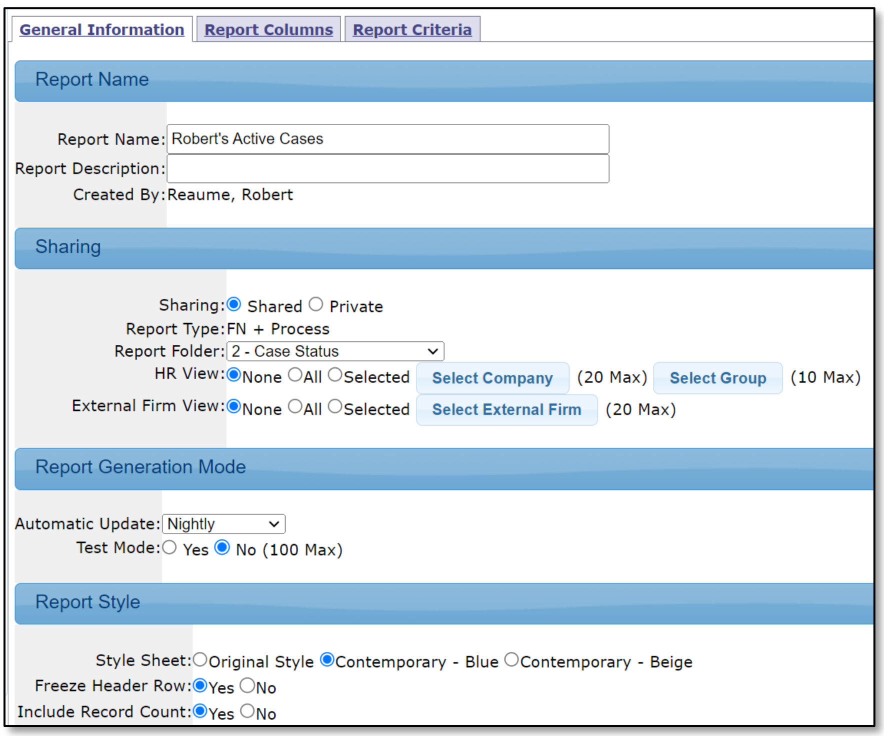
Creating a Case Status Report

1) Click **New** > **Report** > select the **FN + Process** data type.



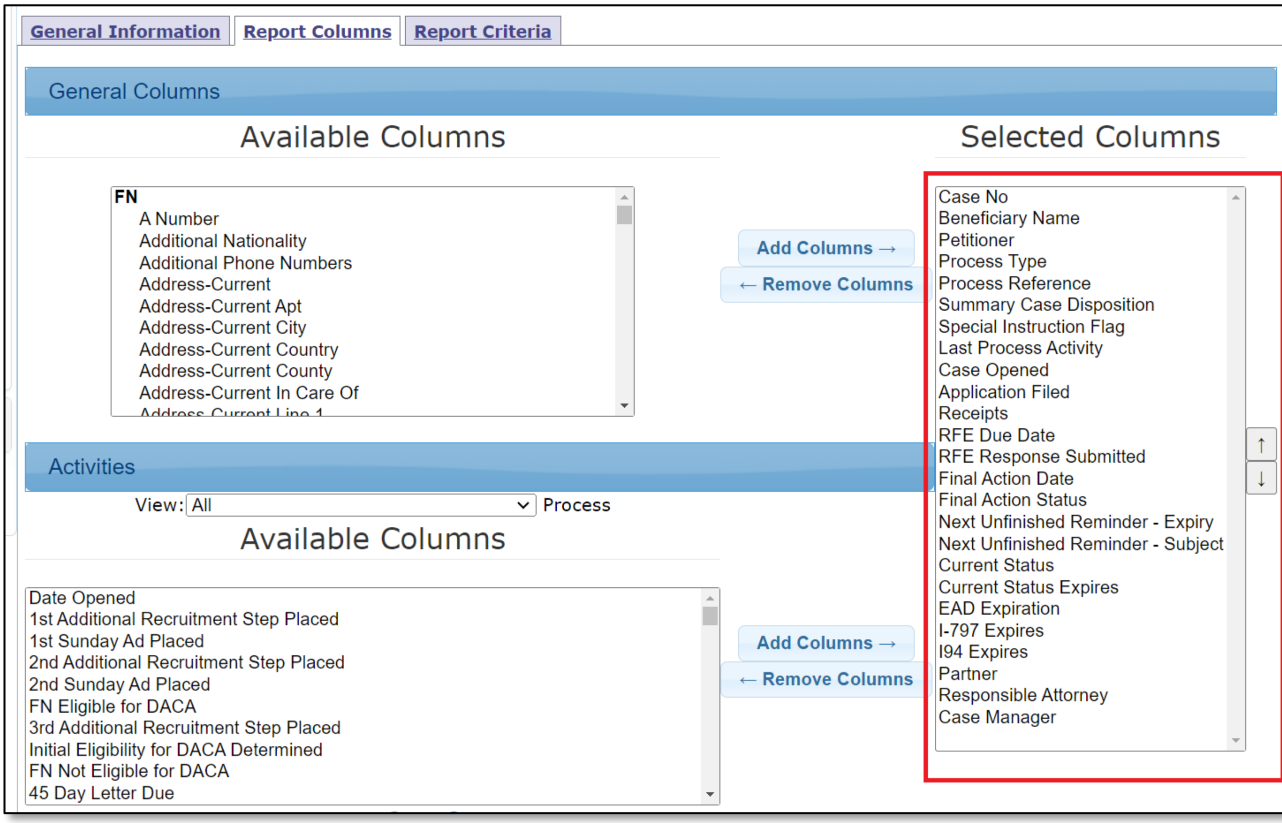


2) Configure the **General Information** settings as desired > click **Update Info**.



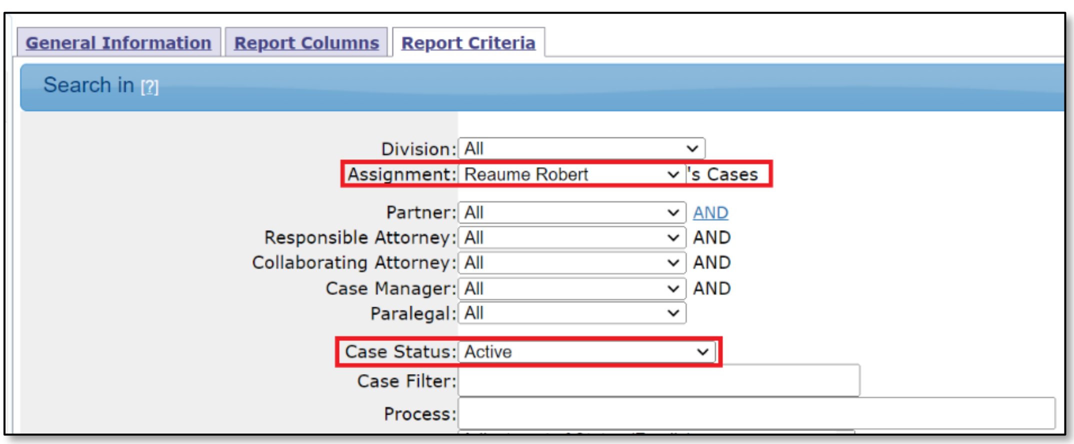
- **Report Name**: Provide a descriptive name that will inform others of the purpose of the report.
- **Sharing**: If desired, select **Shared** so non-Admin users can view and duplicate your template as needed.
- **Report Folder**: Consider placing your report template in a custom folder for better organization.
- **Automatic Update**: If this report will be viewed regularly consider choosing a weekly or nightly routine.
    - Contact Customer Support to enable the “Nightly” option if not present.
- **Style Sheet**: Choose one of the **Contemporary** options for a more modern styling for viewing in-system.
- **Freeze Header Row**: Set to Yes to ensure column headers remain visible when scrolling through results.
- **Include Record Count**: Set to Yes to have a case total included at the bottom of the report.

3) Add the desired fields to your report from the **Report Columns** tab. Refer to the provided field list for useful fields commonly included in a Case Status report.



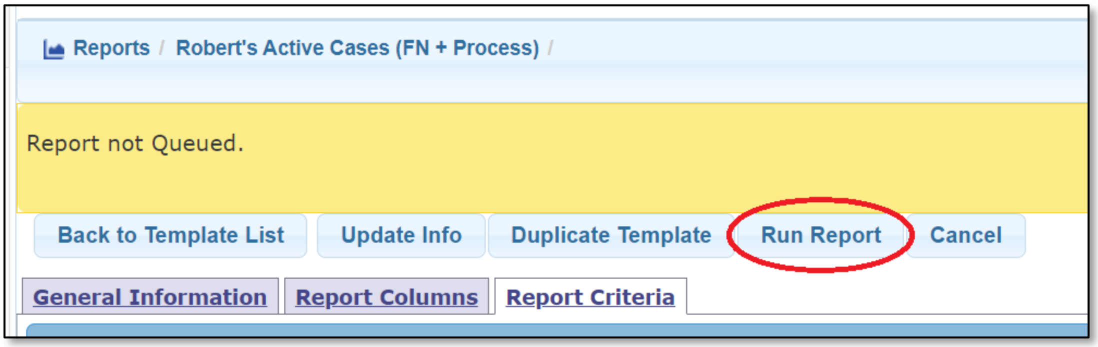
Case Status Report Fields			
Case No	Beneficiary Name	Petitioner	Process Type
Process Reference	Summary Case Disposition	Special Instruction Flag	Case Opened
Application Filed	Receipts	RFE Due Date	RFE Response Submitted
Final Action Date	Final Action Status	Next Unfinished Reminder - Expiry	Next Unfinished Reminder - Subject
Current Status	Current Status Expires	EAD Expiration	I-797 Expires
I94 Expires	Partner	Responsible Attorney	Case Manager

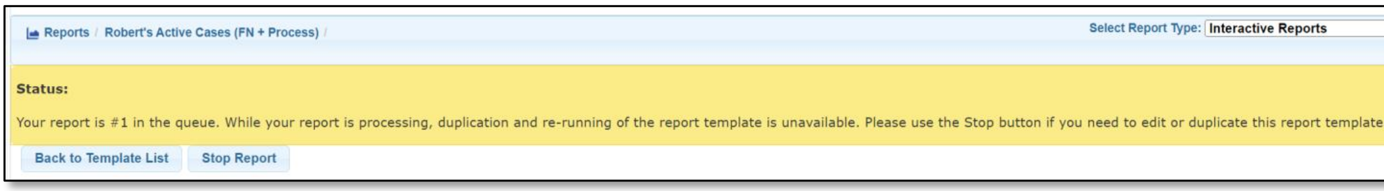
4) From the **Report Criteria** tab configure the desired filters > click **Update Info**.



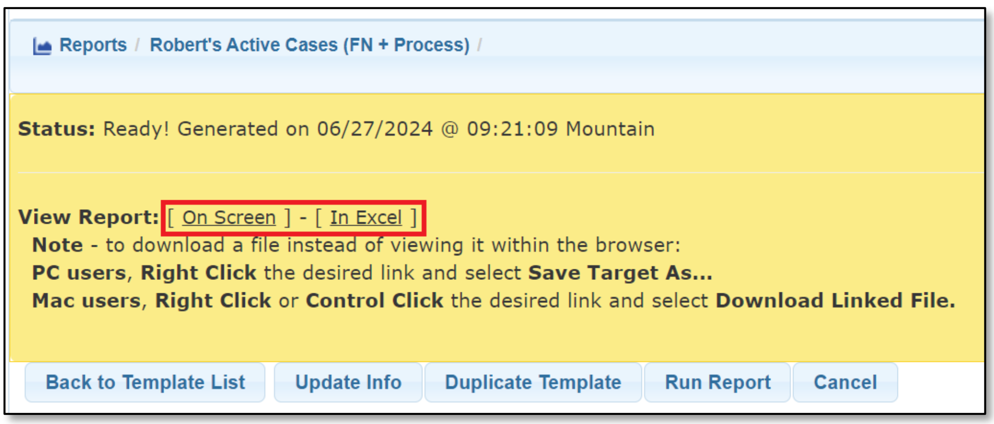
Assignment: Select a user's name to limit the report to only cases they are assigned to.
Case Status: Select **Active** to limit the report to only active (open) cases.

5) When ready, click **Run Report**. Once the report has been placed into the queue you may either remain on the page and wait for the results, or you may leave the page and return later.



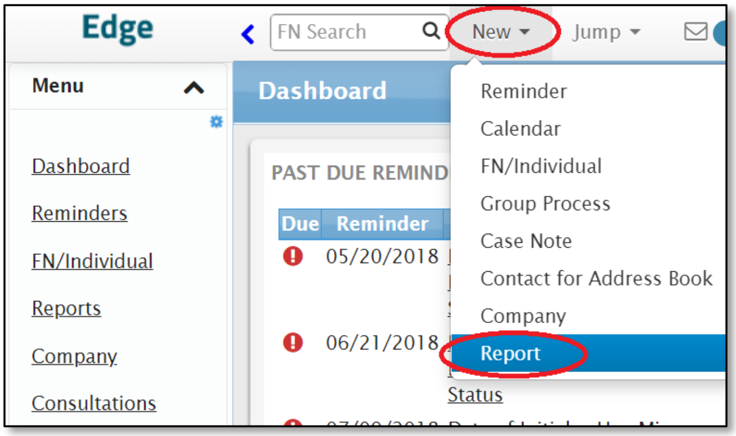


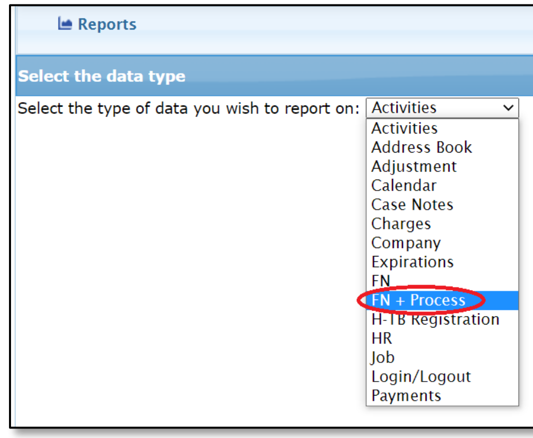
6) Once complete you may view the results **On Screen** or **In Excel**.



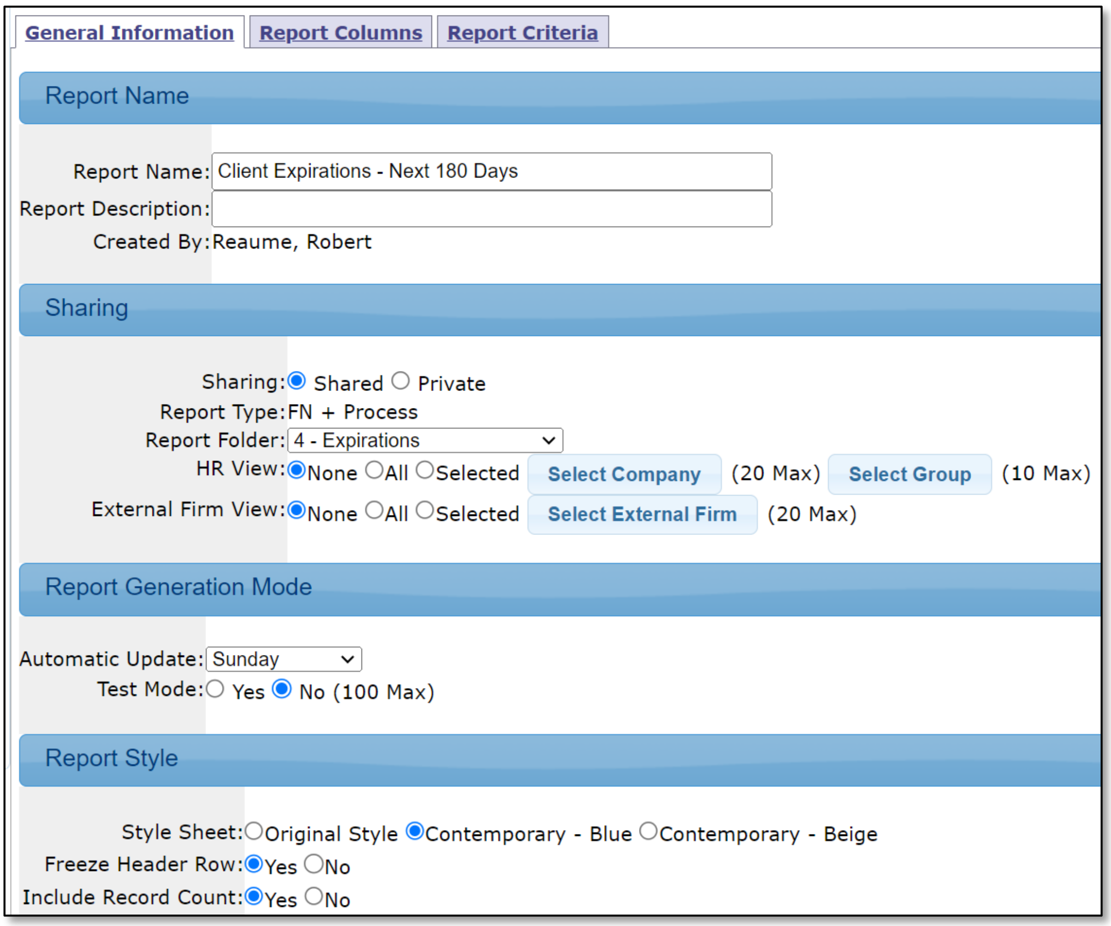
Creating a Client Expiration Report

1) Click **New** > **Report** > select the **FN + Process** data type.



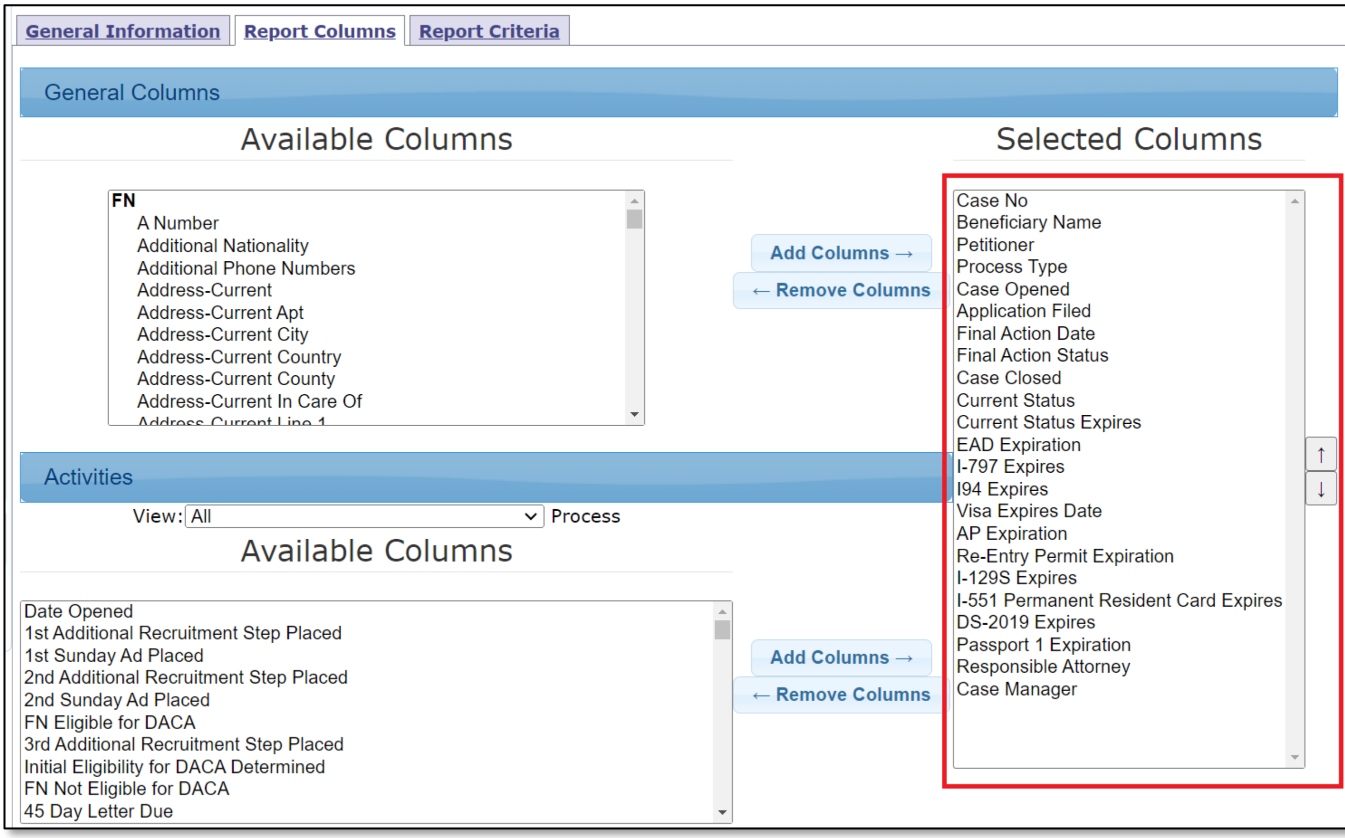


2) Configure the **General Information** settings as desired > click **Update Info**.



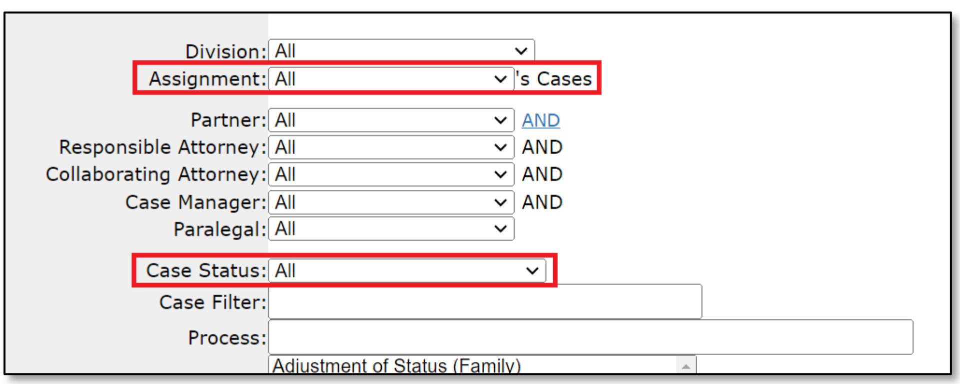
- **Report Name**: Provide a descriptive name that will inform others of the purpose of the report.
- **Sharing**: If desired, select **Shared** so non-Admin users can view and duplicate your template as needed.
- **Report Folder**: Consider placing your report template in a custom folder for better organization.
- **Automatic Update**: If this report will be viewed regularly consider choosing a weekly or nightly routine.
    - Contact Customer Support to enable the “Nightly” option if not present.
- **Style Sheet**: Choose one of the **Contemporary** options for a more modern styling for viewing in-system.
- **Freeze Header Row**: Set to Yes to ensure column headers remain visible when scrolling through results.
- **Include Record Count**: Set to Yes to have a case total included at the bottom of the report.

3) Add the desired fields to your report from the **Report Columns** tab. Refer to the provided field list for useful fields commonly included in a Client Expiration report.

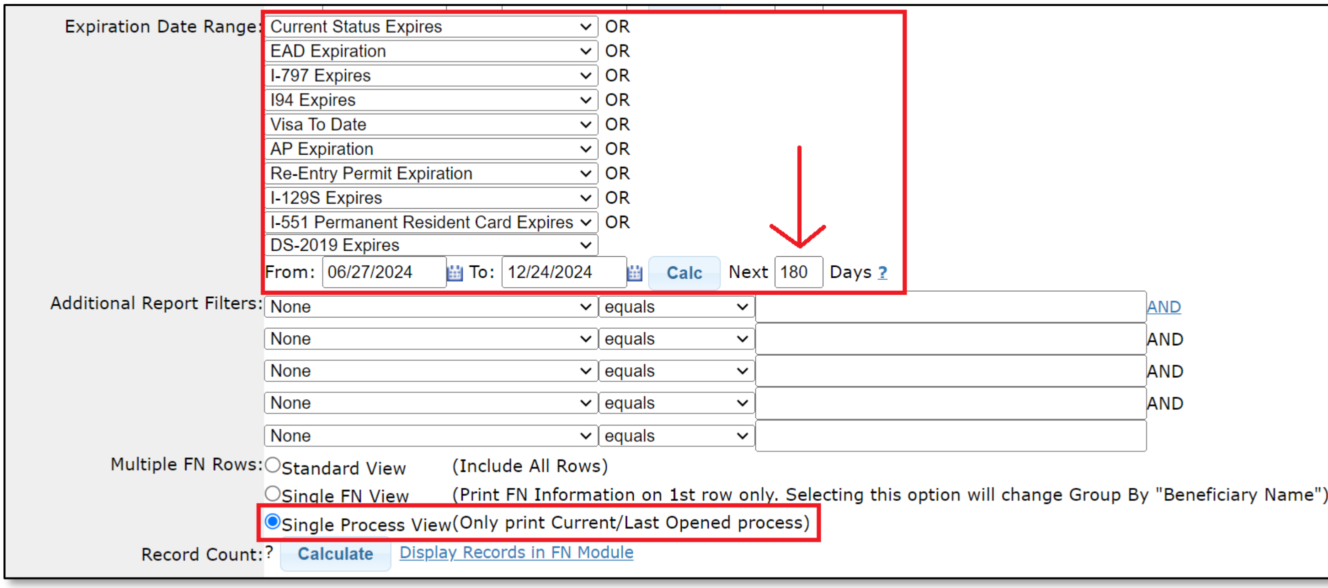


Client Expiration Report Fields			
Case No	Beneficiary Name	Petitioner	Process Type
Case Opened	Application Filed	Final Action Date	Final Action Status
Case Closed	Current Status	Current Status Expires	EAD Expiration
I-797 Expires	I94 Expires	Visa Expires Date	AP Expiration
Re-Entry Permit Expiration	I-129S Expires	I-551 Permanent Resident Card Expires	DS-2019 Expires
Passport 1 Expiration	Responsible Attorney	Case Manager	

4) From the **Report Criteria** tab configure the desired filters > click **Update Info**.

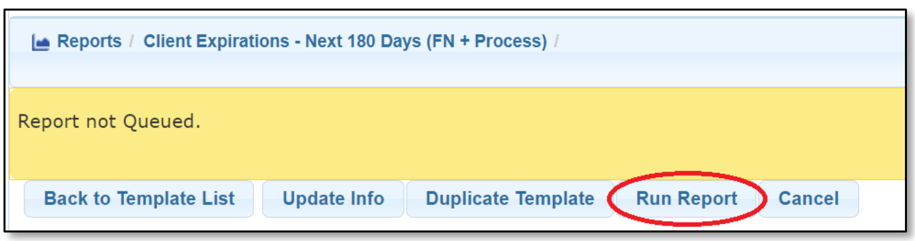


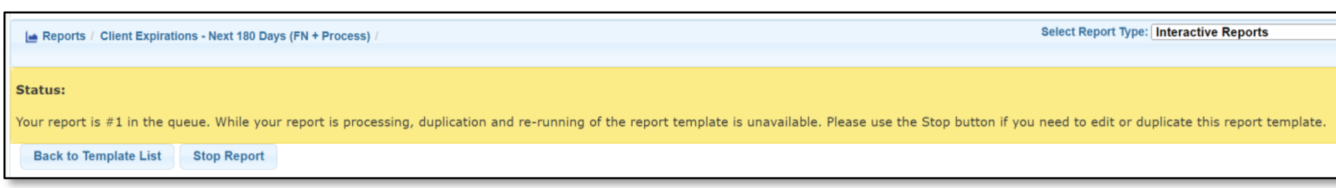
Assignment: Select a user's name to limit the report to only clients they are assigned to.
Case Status: Select **All** to include clients with open and/or closed cases.



Expiration Date Range: Select the desired status documents that you'd like to include in the filter for upcoming expirations. Once you've selected from the three available dropdowns click **Update Info** to make three additional dropdowns available and repeat as needed.
Multiple FN Rows: Select Single Process View to only display each FN once on the report results. If Process-level fields are included in the report the data from the "Current" process (or last opened if no process marked "Current") will be returned.

5) When ready, click **Run Report**. Once the report has been placed into the queue you may either remain on the page and wait for the results, or you may leave the page and return later.





6) Once complete you may view the results **On Screen** or **In Excel**.