

Immigration Case Management (ICM)

Power User Series

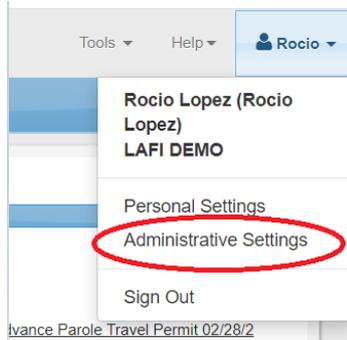
This guide focuses on ways ICM users can manage, customize, and optimize their Activities to efficiently track case progress, determine next steps, and provide increased visibility to their teams and clients.

Note: Users with administrative privileges have the ability to make configuration changes.

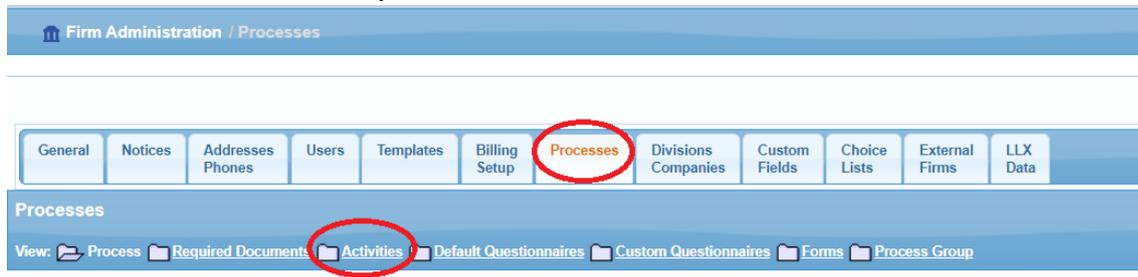
Reviewing Process Type Activities

An organization should review the current Activities in place for each process type. For a holistic view of Process Activities:

Click your name at the top-right and click **Administrative Settings**.



Click the **Processes** tab, followed by the **Activities** sub-folder.



Click the **Print Activity List** button.



This will produce a list of the Process Types with their existing Activities.

Add an Activity to a Process Type

On the Activities page, under **Firm's Activities**, there is a list of every activity within the system.

The screenshot shows the 'Firm's Activities' page. At the top, there is a navigation bar with tabs: General, Notices, Addresses Phones, Users, Templates, Billing Setup, **Processes**, Divisions Companies, Custom Fields, Choice Lists, External Firms, and LLX Data. Below this, there is a 'Process Activities' section with a dropdown menu showing 'Process', 'Revised Documents', **Activities**, 'Default Questionnaires', 'Custom Questionnaires', 'Firms', and 'Process Group'. A yellow banner states: 'The lists below allow you to manage the Activities for each of your Firm's processes.' Below this, the 'Firm's Activities' section is visible, containing a list of activities and a set of action buttons: 'Use Firm Activity', 'Delete Firm Activity', 'Create Firm Activity', 'Edit Firm Activity', 'Toggle FN View', and 'Toggle HR View'.

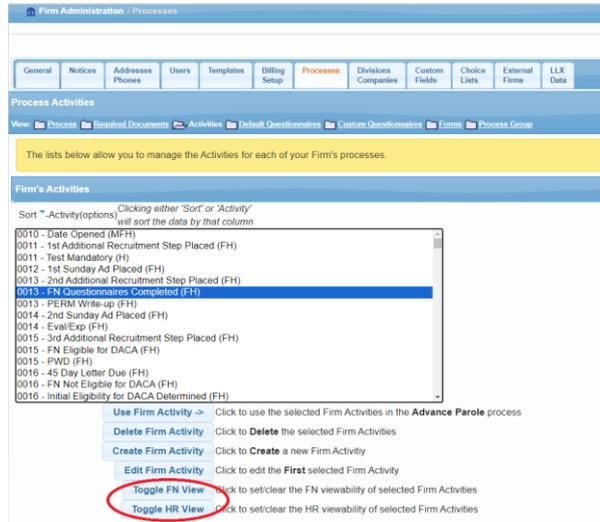
To add an Activity to a specific Process Type, select the Process from the drop-down menu under **Process Activities**.

The screenshot shows the 'Process Activities' page. At the top, there is a navigation bar with tabs: General, Notices, Addresses Phones, Users, Templates, Billing Setup, **Processes**, Divisions Companies, Custom Fields, Choice Lists, External Firms, and LLX Data. Below this, there is a 'Process Activities' section with a dropdown menu showing 'Process', 'Revised Documents', 'Activities', 'Default Questionnaires', 'Custom Questionnaires', 'Firms', and 'Process Group'. A yellow banner states: 'The lists below allow you to manage the Activities for each of your Firm's processes.' Below this, the 'Process Activities' section is visible, containing a list of activities and a set of action buttons: 'Update Sort Order', 'Edit Expiration Linkage', and 'Delete Process Activity'. A dropdown menu is open, showing 'Firm/Company to update' and 'Process' with 'Advance Parole' selected.

Next, from the **Firm's Activities**, select and highlight the activity and click the **Use Firm Activity** button. (To capture multiple Activities at once, hold down the Control button on the keyboard.) The selected Activity will display under the Process Activities > Process. To sort the order of an Activity, highlight the Activity and use the arrows (↑↓) and save the changes by clicking **Update Sort Order**.

The screenshot shows the 'Firm's Activities' page. At the top, there is a navigation bar with tabs: General, Notices, Addresses Phones, Users, Templates, Billing Setup, **Processes**, Divisions Companies, Custom Fields, Choice Lists, External Firms, and LLX Data. Below this, there is a 'Process Activities' section with a dropdown menu showing 'Process', 'Revised Documents', **Activities**, 'Default Questionnaires', 'Custom Questionnaires', 'Firms', and 'Process Group'. A yellow banner states: 'The lists below allow you to manage the Activities for each of your Firm's processes.' Below this, the 'Firm's Activities' section is visible, containing a list of activities and a set of action buttons: 'Use Firm Activity', 'Delete Firm Activity', 'Create Firm Activity', 'Edit Firm Activity', 'Toggle FN View', and 'Toggle HR View'. The activity '0013 - FN Questionnaires Completed (FH)' is highlighted in blue. The 'Use Firm Activity' button is circled in red.

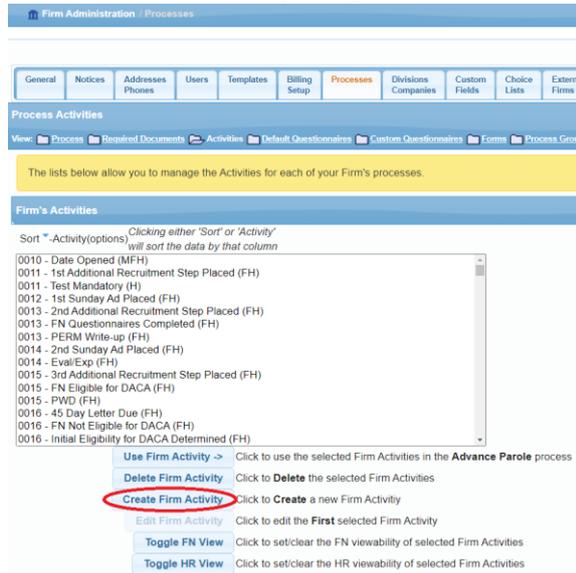
Users can also configure Activities to be visible to their foreign national and/or HR corporate clients on the client portal. This can be accomplished by highlighting the Activity under Firm's Activity and selecting the **Toggle FN View** or **Toggle HR View** option. An Activity with a (FH) notation will indicate it is viewable to a foreign national or HR.



Add a Custom Activity

Note: As a best practice, ensure the Activity doesn't already exist in the Firm's Activities library prior to creating a custom Activity.

To create a custom Activity, navigate to the **Firm's Activities** and select **Create Firm Activity**.



Complete the designated fields (Sort, Name, etc) and click **Create Firm Activity**.

The screenshot shows the 'Create Firm Activity' dialog box. It contains the following fields and options:

- Sort: [Text input field]
- Name: [Text input field]
- Behaves Like: [Dropdown menu with 'None' selected]
- Receipt:
- Mandatory: Yes No
- Note: Making an activity mandatory will cause it to be added to every existing process.
- Email Template: [Dropdown menu with 'None' selected]

 At the bottom of the dialog are two buttons: 'Create Firm Activity' and 'Cancel'.

Link an Email Template to an Activity

Note: Prior to carrying out the steps outlined below, the email template must already exist in the system Templates Tab.

Users can streamline their workflow by associating an email template to a desired Activity. Select the Activity from the Firm's Activities, and click **Edit Firm Activity**.

The screenshot shows the 'Firm Administration / Processes' page. Under the 'Process Activities' section, there is a list of 'Firm's Activities'. The activity '0163 - Forms Submitted to FN for Signature (FH)' is selected and highlighted in blue. Below the list, there are several action buttons: 'Use Firm Activity ->', 'Delete Firm Activity', 'Create Firm Activity', 'Edit Firm Activity', 'Toggle FN View', and 'Toggle HR View'. The 'Edit Firm Activity' button is circled in red.

In the next prompt, select the template from the **Email Template** dropdown menu.

The screenshot shows the 'Update Firm Activity' dialog box. The 'Name' field is 'Forms Submitted to FN for Signature'. The 'Email Template' dropdown menu is open, showing a list of templates. The template 'Forms for Review and Signature' is selected and highlighted in blue. The 'Update Firm Activity' button is visible at the bottom right of the dialog.

The email template linked to the Activity will be displayed in the foreign national's Activities Page.

The screenshot shows the 'Activities' page for 'Advance Parole'. The page displays a list of activities with columns for 'Activity Name', 'Date Completed', and 'Receipt'. The activity 'Forms Submitted to FN for Signature' is highlighted in blue, and its receipt is 'Send Message: Forms for Review and Signature', which is circled in red.

Activity Name	Date Completed	Receipt
Date Opened	04/19/2024	Send Engagement Message
Welcome Email Sent to FN		Send Welcome Message Send Welcome E-Mail
FN Questionnaires Completed		Send Questionnaire Received Message
All FN Docs Received		
Forms Submitted to FN for Signature		Send Message: Forms for Review and Signature

Remove an Activity from a Process Type

Within the **Process Activities**, select a Process and then highlight the desired activity to be removed and click **Delete Process Activity**.

Note: Activities under the Firm's Activities with an (M) notation, are considered mandatory and cannot be deleted.

The screenshot displays the 'Process Activities' management interface. The top navigation bar includes 'Firm Administration' and 'Processes'. Below this, a menu bar contains 'General', 'Notices', 'Addresses/Phones', 'Users', 'Templates', 'Billing Setup', 'Processes', 'Divisions/Companies', 'Custom Fields', 'Choice Lists', 'External Firms', and 'LLX Data'. The main content area is titled 'Process Activities' and includes a sub-menu with 'Process', 'Related Documents', 'Activities', 'Default Questionnaires', 'Custom Questionnaires', 'Firms', and 'Process Group'. A yellow banner states: 'The lists below allow you to manage the Activities for each of your Firm's processes.'

Firm's Activities

Sort "Activity" options: Clicking either "Sort" or "Activity" will sort the data by that column.

- 0010 - Date Opened (MFH)
- 0011 - 1st Additional Recruitment Step Placed (FH)
- 0011 - Test Mandatory (H)
- 0012 - 1st Sunday Ad Placed (FH)
- 0013 - 2nd Additional Recruitment Step Placed (FH)
- 0013 - FN Questionnaires Completed (FH)
- 0014 - 2nd Sunday Ad Placed (FH)
- 0014 - Eval/Exp (FH)
- 0015 - 3rd Additional Recruitment Step Placed (FH)
- 0015 - FN Eligible for DACA (FH)
- 0015 - PWD (FH)
- 0016 - 45 Day Letter Due (FH)
- 0016 - FN Not Eligible for DACA (FH)
- 0016 - Initial Eligibility for DACA Determined (FH)

Use Firm Activity: Click to use the selected Firm Activities in the **Advance Parole** process.

Delete Firm Activity: Click to **Delete** the selected Firm Activities.

Create Firm Activity: Click to **Create** a new Firm Activity.

Edit Firm Activity: Click to edit the **First** selected Firm Activity.

Toggle FN View: Click to set/clear the FN visibility of selected Firm Activities.

Toggle HR View: Click to set/clear the HR visibility of selected Firm Activities.

Process Activities (Group of Firm's Activities per process)

Firm or a Country to update the list below: Firm/Company to update: **Advance Parole**

Process: **Advance Parole**

Sort-Activity (options):

- 0010 - Date Opened (MFH)
- 0014 - Eval/Exp (FH)
- 0019 - FN Questionnaires Completed (FH)
- 0018 - FN Interview Rescheduled (FH)
- 0015 - Forms Submitted to FN for Signature (FH)
- 0016 - Signed Forms Received (FH)
- 0017 - Application Filed (FH)
- 0018 - Application Receipt (RFH)
- 0019 - Receipt Sent (FH)
- 0020 - RFE Received (FH)
- 0021 - RFE Due Date (FH)
- 0022 - RFE Response Submitted (FH)
- 0023 - Approval Notice Received (MFH)
- 0000 - Final Action (MFH)
- 0016 - Date Status Valid From (FH)

Update Sort Order: Change Sort Order with "↑" button and Click **Update Sort Order**.

Edit Expiration Linkage: Click to setup link to Expiration Action Status **Edit Expiration Linkage**.

Delete Process Activity: Select Process Activity to delete and click **Delete Process Activity**.