Immigration Case Management (ICM)

Power User Series

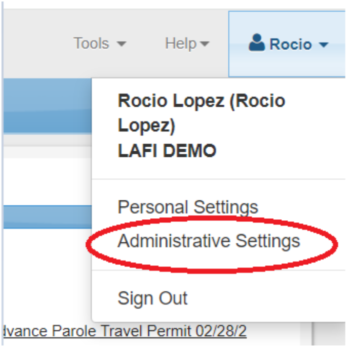
This guide focuses on ways ICM users can manage, customize, and optimize their Activities to efficiently track case progress, determine next steps, and provide increased visibility to their teams and clients.

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

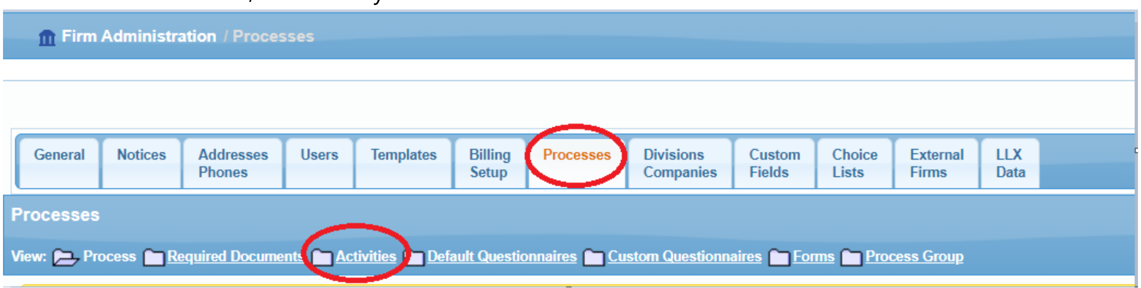
Reviewing Process Type Activities

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

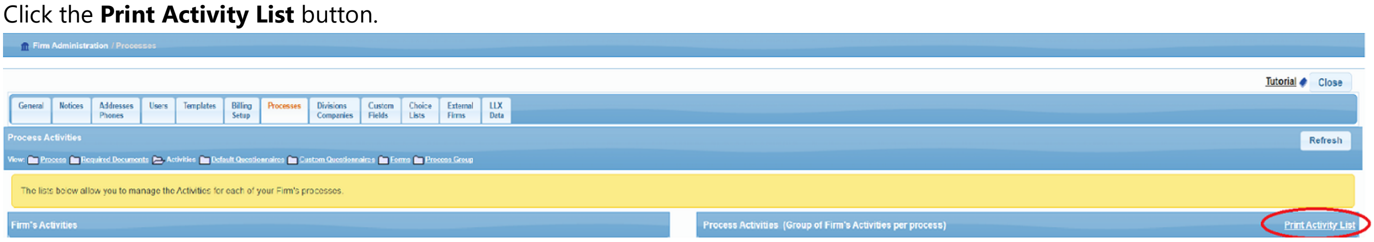
Click your name at the top-right and click **Administrative Settings**.



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



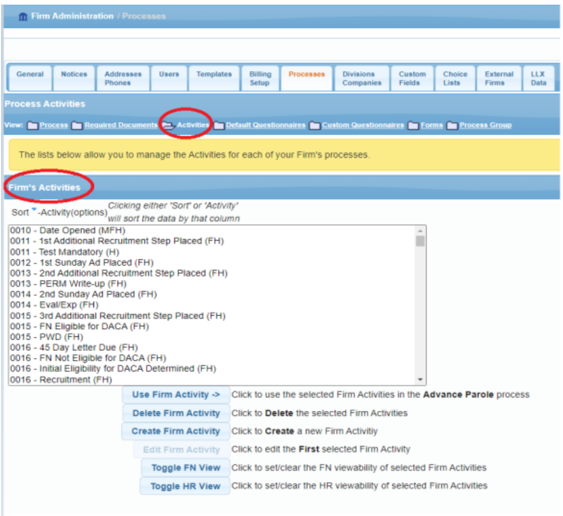
Click the **Print Activity List** button.



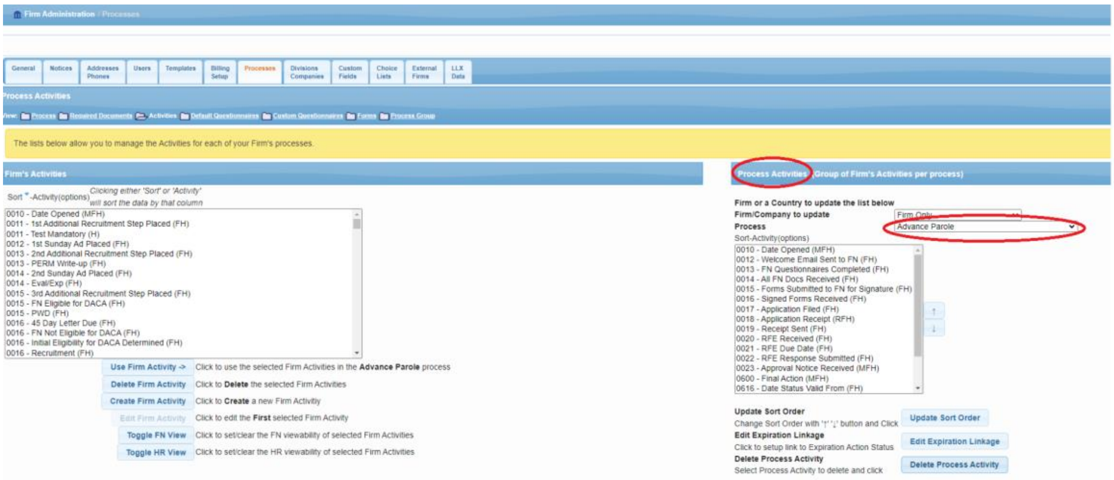
This will produce a list of the Process Types with their existing Activities.

Add an Activity to a Process Type

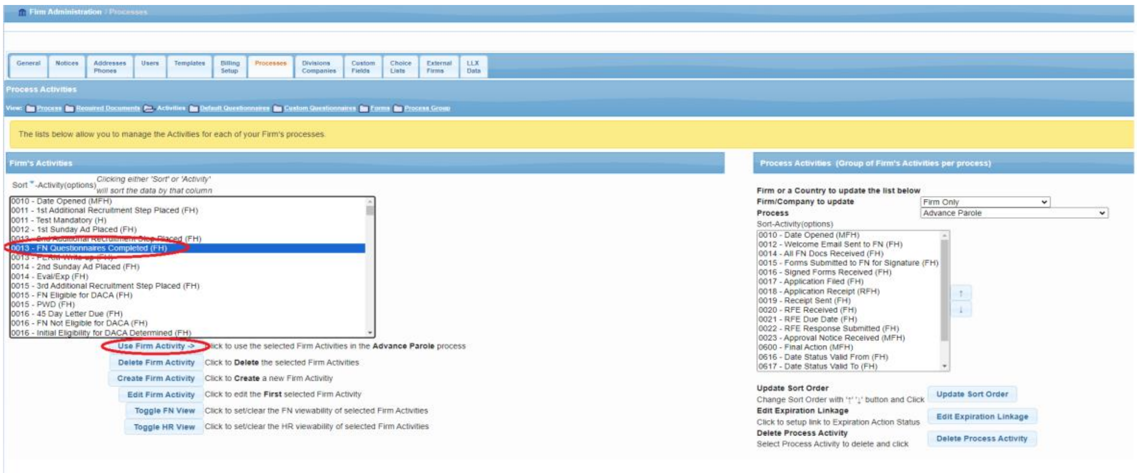
On the Activities page, under **Firm's Activities**, there is a list of every activity within the system.



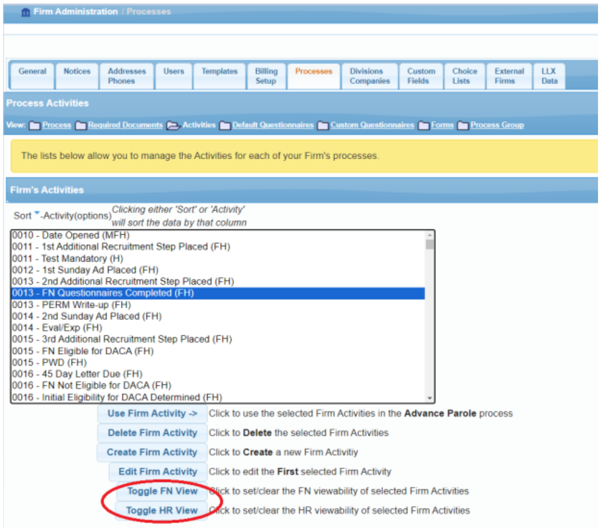
To add an Activity to a specific Process Type, select the Process from the drop-down menu under **Process Activities**.



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**.



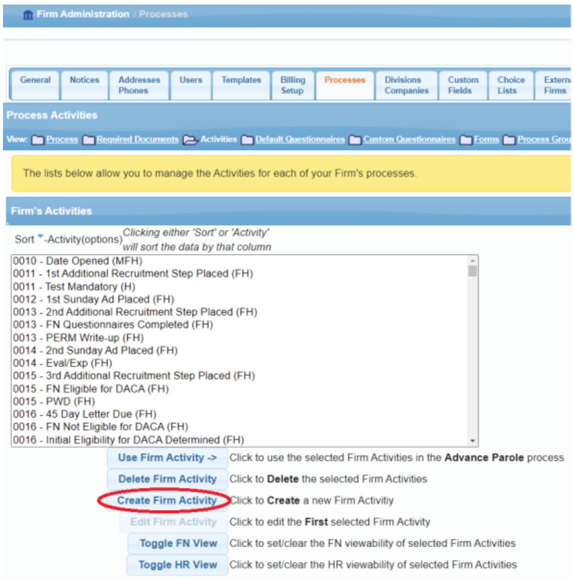
Users can also configure Activities to be visible to their foreign national and/or HR corporate clients on the client portal. This can be accomplished by highlighting the Activity under Firm's Activity and selecting the **Toggle FN View** or **Toggle HR View** option. An Activity with a (FH) notation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



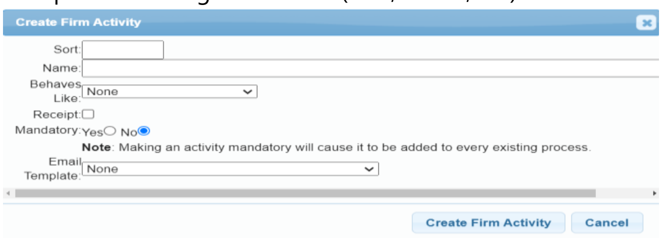
Add a Custom Activity

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.**



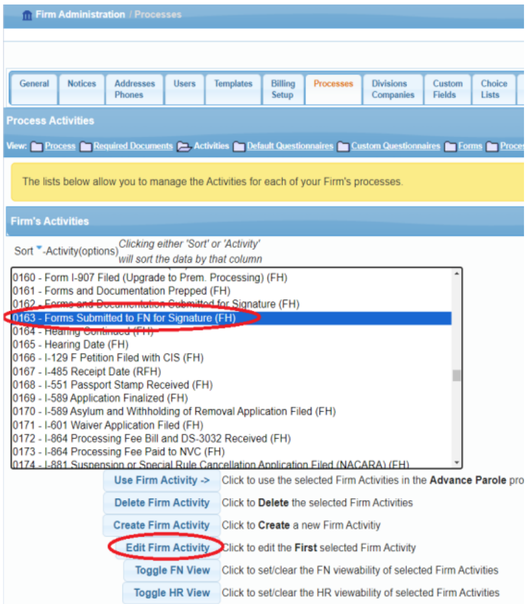
Complete the designated fields (Sort, Name, etc) and click **Create Firm Activity**.



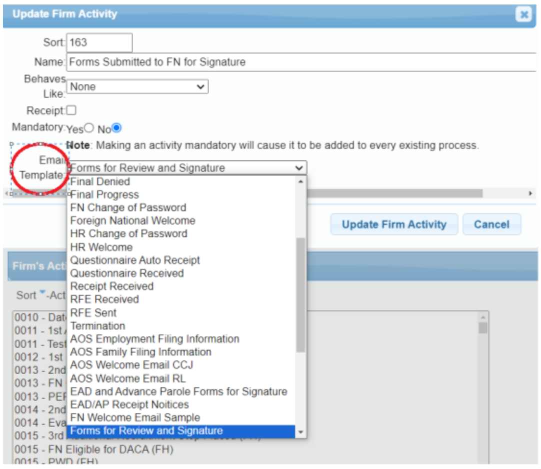
Link an Email Template to an Activity

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

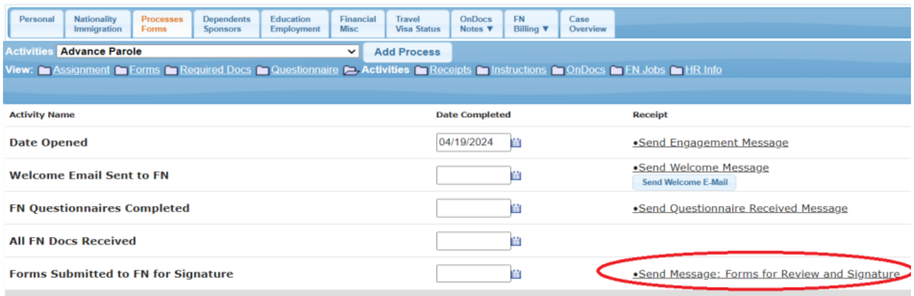
Users can streamline their workflow by associating an email template to a desired Activity. Select the Activity from the Firm's Activities, and click **Edit Firm Activity**.



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



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



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.