

## Immigration Case Management (ICM)

**Power User Series** 

If your ICM dashboard looks similar to the below, please consider following this guide to customize your dashboard and create a more informative display.

| EavLogix, Case Management S <sub>1</sub> ×         ← → C ☆ ▲ https://www.         → A ☆ ▲ https://wwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwww | + Exelomediant.com                                        |   | - ۲<br>ه ه (۲ ۲ ۲)                                                                                                                                                                                                                                                                                                                                     | •      |
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| EQUITAX   Workforce<br>Solutions<br>Immigration Case Management                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | < FN Search Q New - Jump - 20 -                           |   | Tools 👻 Help+ 🛔                                                                                                                                                                                                                                                                                                                                        | •      |
| Menu 🔨                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Dashboard                                                 |   |                                                                                                                                                                                                                                                                                                                                                        | 0      |
| Consultations<br>Reminders<br>Expirations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | CALENDAR EVENTS  No events scheduled for selected filters | Q | NEWS FROM LAWLOGIX  Dete PostedSubject  09/28/2023 System Updates as of Thursday 09/28/2023  09/22/2023 Receipt Lookup- USCIS preventing processing of ICM requests                                                                                                                                                                                    | L<br>Î |
| Calendars<br>EN/Individual<br>Case Notes<br>Address Book                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                           |   | 09/18/2023         Visa Bulletin for October 2023           09/14/2023         System Updates as of Thursday 09/14/2023           09/14/2023         Register now for the FREE October 2023 Power User Workshop!           08/31/2023         System Updates as of Thursday 08/31/2023           08/22/2023         Resolved- Outlook Integrator Issue | -      |
| Company<br>Reports<br>Billing<br>Dashboard<br>History                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | CONSULTATIONS BY MONTH C                                  | Q | NEWS FROM PUW 2023 C<br>Date Posted Subject<br>05/10/2023 How to Contact Support<br>05/09/2023 On-Demand Training Videos                                                                                                                                                                                                                               |        |

By customizing your ICM dashboard, you will improve your visibility into the data and insights you need most, including: active cases, past due reminders, upcoming reminders, reports, and events.

| Dashboard                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |   |                                                                  | ٠ |
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| NEWS FROM LAWLCGCK  Tele Posted Solger  06590204 System Ukates as of Wednesdy 55520224  0572024 System Ukates as of Wednesdy 55520226  05710204 System Ukates as of Wednesdy 555202024  057150204 Hoster Ukates as of Wednesdy 55152024  0560204 Waster Ukates as of Wednesdy 55602024  0560204 Waster Ukates as of Wednesdy 55602024 | 0 | MY ACTIVE CASES CONTROL OF A CONTROL A CONTROL OF A CONTROL OF A CONTROL A CONTR | ٩ | MY RECENTLY OPENED CASES<br>Date range: 05/28/2024 to 06/03/2024 | Q |
| PAST DUE REMINDERS CO<br>Due Reminde Subject PACTerret<br>● 09202022 Expenden Date - Curret Status Magie Morre<br>● 0406/2023 Expenden Date - Passoot Max David                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Q | NEEDS ATTENTION SOON (2) (0)<br>Due Rominider Sobject (FAChent                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |   | UPCOMING REMINDERS 🔁<br>Due Neminder Subject FNichent            | Q |
| DATE CALCULATOR Enter any 2 values to solve missing value Start Ent: Ent:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | • | Control (2)         Control (2) <thcontrol (2)<="" th=""> <thcontrol (2)<="" th=""></thcontrol></thcontrol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | • | NEWS FROM LAFT DEMO                                              | Q |

## **Customize your Dashboard**

To edit your dashboard, click on the gear icon near the top right corner of your ICM home page.

| EQUINAL   Workfarce<br>Solutions<br>Immigration Case Manageme | Kearch Q New - Jump - CO-                | Tools + Help+ 🛔                                                                                                               | • |
|---------------------------------------------------------------|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|---|
| Menu 🧳                                                        | Dashboard                                |                                                                                                                               | ( |
| Consultations<br>Reminders                                    | CALENDAR EVENTS                          | Q NEWS FROM LAWLOGIX                                                                                                          | Q |
| Expirations                                                   | No events scheduled for selected filters | 09/28/2023 System Updates as of Thursday 09/28/2023                                                                           | 1 |
| Calendars                                                     |                                          | 09/22/2023 Receipt Lookup- USCIS preventing processing of ICM requests<br>09/18/2023 Visa Bulletin for October 2023           |   |
| N/Individual                                                  |                                          | 09/14/2023 System Updates as of Thursday 09/14/2023                                                                           |   |
| Case Notes                                                    |                                          | 09/14/2023 Register now for the FREE October 2023 Power User Workshop!<br>08/31/2023 System Updates as of Thursday 08/31/2023 |   |
| Address Book                                                  |                                          | 08/22/2023 Resolved- Outlook Integrator Issue                                                                                 |   |

Click on the drop down and select the column formatting to 3. This will determine the layout of your dashboard and allow for more widgets to be added. It is recommended to delete all the widgets currently present on your Dashboard. (The only widget we cannot delete is the *NEWS FROM LAWLOGIX*.) Click the floppy disk sign to save changes.

| Dashboard                                 |            |                                                       | Dashboard layout:                                                  | B |
|-------------------------------------------|------------|-------------------------------------------------------|--------------------------------------------------------------------|---|
|                                           |            |                                                       | 2 columns (1:1)                                                    | ~ |
| CALENDAR EVENTS                           | ¢@         | NEWS FROM LAWLOGIX                                    | 3 columns<br>2 columns (2:1)<br>2 columns (1:2)<br>2 columns (1:1) | 2 |
| O NO EVENIS SCHEDUIED IOI SELECTED INTERS |            | 09/28/2023 System Updates as of Thursday 09/28/2023   | 1 column                                                           |   |
|                                           |            | 09/22/2023 Receipt Lookup- USCIS preventing processin | g of ICM requests                                                  |   |
|                                           |            | 09/18/2023 Visa Bulletin for October 2023             |                                                                    |   |
|                                           |            | 09/14/2023 System Updates as of Thursday 09/14/2023   |                                                                    |   |
|                                           |            | 09/14/2023 Register now for the FREE October 2023 Pow | ver User Workshop!                                                 |   |
|                                           |            | 08/31/2023 System Updates as of Thursday 08/31/2023   |                                                                    |   |
|                                           |            | 08/22/2023 Resolved- Outlook Integrator Issue         |                                                                    |   |
| =                                         |            | =                                                     |                                                                    | _ |
| CONSULTATIONS BY MONTH                    | <b>۵</b> ۵ | NEWS FROM PUW 2023                                    |                                                                    | Q |
| Date range: 01/01/2023 to 12/31/2023      | î          | Date Posted Subject                                   |                                                                    |   |
| TOP TEN DATE CALENDAR EVENTS              | UNP        | AID INVOICES PROCESS COUNT NEWS FRO                   | A N                                                                |   |

Begin to drag and drop widgets to your dashboard (below are recommendations). To save changes, click the floppy disk icon.

| Dashboard                                                                                                                                                                                                                                 |                            |                                              |               | Dashboard layout:                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|----------------------------------------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                           |                            |                                              |               | 3 columns 🗸                                                                                                                             |
| NEWS FROM LAWLOGIX Diste Posted Subject 0003/2024 System Updates as of Monday 08/03/2024 05/30/2024 System Updates as of Wednesday 05/29/2024                                                                                             | PROCESS COUNT (3) 🖉<br>Dat | e range: 05/26/2024 to 06/08/2024            | ¢Q<br>^       | PROCESS COUNT (2) C (3) (3) (3) (3) (3) (3) (3) (3) (3) (3)                                                                             |
| 05/32/2024 System Updates as of Wednesday 05/22/2024     05/16/2024 Questionmaine Distatar suse     05/15/2024 Augustionmaine Distatar suse     05/15/2024 System Updates as of Wednesday 05/15/2024     05/09/2024 Update on Email 05/08 |                            |                                              |               |                                                                                                                                         |
| TOP TEN REMINDERS (4) 🕑 😶 🔍                                                                                                                                                                                                               | TOP TEN REMINDERS (5) C    | Subject FNCClient                            | <b>0</b> 0    | TOP TEN REMINDERS (9) 🗭 😟 😡                                                                                                             |
|                                                                                                                                                                                                                                           |                            | =                                            |               | NEWS FROM LAFI DEMO                                                                                                                     |
| DATE CALCULATOR                                                                                                                                                                                                                           | REPORTING (2)              |                                              | Q             | Date Posted Subject                                                                                                                     |
| Enter any 2 values to solve missing value                                                                                                                                                                                                 | Report Name                | View Edit Created Last Re<br>By Generated Co | ecord<br>ount | 05/23/2023 How to Contact ICM Support Team<br>01/04/2023 On-Demand Training Videos                                                      |
| Start:                                                                                                                                                                                                                                    | LCA worksites              | Excel<br>On-Screen Edit Rocio 05/29/2024     | 35            | 10/29/2021 New Travel Executive Order<br>04/12/2019 Update on USCIS Practice of Denying Pending Advance Parole Travel Permit<br>02/28/2 |
| End:                                                                                                                                                                                                                                      | LoginLogOut                | On-Screen Edit Rocio 05/22/2024              | 155           |                                                                                                                                         |

\*\*Highlighted above are the widgets that will require filtering using the gear icons.

**Process Count:** This is a powerful widget that will display process counts by a set of filter criteria that you specify. **Top Ten Reminders:** Customize the widget to see reminders that are past due, due soon, and upcoming. **Date Calculator:** Calculate dates with ease.

Reporting: This provides visibility into the ten most recently run reports by the firm.

**News from Your Firm:** Your firm may choose to post updates, news and information that they would like to broadcast to the team.

By clicking on the gear icon within a widget, you can customize the filter criteria. Included below are suggestions for your filter criteria. (Note, you can filter and label the widgets differently based on your individual needs.)

|                                                      |   |                       |                          |   |     | 17                    |                         |   |         |
|------------------------------------------------------|---|-----------------------|--------------------------|---|-----|-----------------------|-------------------------|---|---------|
| NEWS FROM LAWLOGIX                                   | Q | PROCESS COUNT (3)     |                          |   | ⊵ଉଷ | PROCESS COUNT (2)     |                         |   | 🛯 🛛 🖉 🖉 |
| Date Posted Subject                                  | ^ | Widget Title:         | My Active Cases          |   |     | Widget Title:         | My Recently opened case |   |         |
| 06/03/2024 System Updates as of Monday 06/03/2024    |   |                       |                          |   |     |                       |                         |   |         |
| 05/30/2024 System Updates as of Wednesday 05/29/2024 |   | Filter By:            | Role Type                | ~ |     | Filter By:            | Role Type               | ~ |         |
| 05/23/2024 System Updates as of Wednesday 05/22/2024 |   |                       |                          |   |     |                       |                         |   |         |
| 05/16/2024 Questionnaire Display issue               |   | Role Type:            | Select                   |   |     | Role Type:            | Select                  |   |         |
| 05/15/2024 N400-Release Notes                        |   |                       |                          |   |     | 11                    |                         |   |         |
| 05/15/2024 System Updates as of Wednesday 05/15/2024 |   | Users (Optional):     |                          |   |     | Users (Optional):     |                         |   |         |
| 05/09/2024 Update on Email 05/08                     |   |                       |                          |   |     |                       |                         |   |         |
| 05/09/2024 Visa Bulletin for June 2024               |   | Process Status:       | Open 🗸                   |   |     | Process Status:       | Open 🗸                  |   |         |
| 05/08/2024 System Updates as of Wednesday 05/08/2024 |   | Group By:             | Process Type             |   |     | Group By:             | Day of Week             | ~ |         |
| 05/02/2024 System Updates as of Thursday 05/02/2024  |   | Group By:             | 1100000 1990             | • |     | Group by:             | buy of from             | - |         |
| 05/02/2024 Maintenance update at 5PM Eastern         |   | Chart Type:           | Pie 🗸                    |   |     | Chart Type:           | Line 🗸                  |   |         |
| 05/01/2024 Intermittent delayed delivery of email    |   |                       |                          |   |     |                       |                         |   |         |
| 04/25/2024 System Updates as of Thursday 04/25/2024  |   | Date Opened Range:    | C&-5Y Calculate          |   |     | Date Opened Range:    | C&-1W Calculate 😮       |   |         |
| 04/18/2024 System Updates as of Thursday 04/18/2024  |   |                       |                          |   |     |                       |                         |   |         |
| 04/11/2024 System Updates as of Thursday 04/11/2024  | - |                       | 05/26/2024 to 06/08/2024 |   |     |                       |                         |   |         |
|                                                      |   |                       | =                        | _ |     |                       |                         |   |         |
|                                                      | 9 | 1                     |                          |   |     | 1                     |                         |   | 9       |
| TOP TEN REMINDERS (4)                                | Q | TOP TEN REMINDERS (5) | r                        |   | BOQ | TOP TEN REMINDERS (6) | 3                       |   | BOQ     |
| Widget Title: Past Due Reminders                     |   | Widget Title          | Needs Attention Soon     |   |     | Widget Titl           | Lincoming Reminders     |   |         |
|                                                      |   |                       |                          |   |     | mager m               | opcoming reminders      |   |         |
| Assigned To: Mine 🗸                                  |   | Assigned To:          | : Mine 🗸                 |   |     | Assigned T            | x Mine 🗸                |   |         |
|                                                      |   |                       |                          |   |     |                       |                         |   |         |
| Status: Expired Reminders 🗸                          |   | Status                | : Open Reminders 🗸       |   |     | Statu                 | s: Future Reminders 🗸   |   |         |
|                                                      |   |                       |                          |   |     |                       |                         |   |         |
|                                                      |   |                       |                          |   |     |                       |                         |   |         |
|                                                      |   |                       |                          |   |     |                       |                         |   |         |
| =                                                    |   |                       | =                        |   |     |                       | =                       |   |         |

Continue to save changes using the floppy disk icons. Your dashboard should now look like the below.

| Dashboard                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
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| NEWS FROM LAWLOCK  NeWS FROM LAWLOCK  New Fronted Gildged  65930024 System Updates as of Workesday 65252022  659502024 System Updates as of Workesday 6522022  659502024 System Updates as of Workesday 65952024  659502024 System Updates as of Workesday 65952024  659502024 System Updates as of Workesday 6595024  650802024 System Updates as of Workesday 65802024  850802024 System Updates as of Workesday 65802024  85080204  85080204  85080204  8508020  850802  85080  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508  8508 | • | MY ACTIVE CASES IS         Q           Date range: 01/01/2019 to 12/31/2024         Date range: 05/28/2024 to 06/03/2024         Date range: 05/28/2024 to 06/03/2024           Naturalization: 50.6800         Advance Parole: 14 (4.70)         Date range: 05/28/2024 to 06/03/2024         Date range: 05/28/2024 to 06/03/2024           H4 Devices It 15 03300         Advance Parole: 14 (5.70)         Advance Parole: 14 (5.70)         Date range: 05/28/2024 to 06/03/2024         Date range: 05/28/2024 to 06/03/2024           H4 Devices It 15 03300         Advance Parole: 14 (5.70)         Monday         Thurnday           H-18 Registration: 48 (0.61)00         H-18 CxP: 16 (5.370)         Process Count                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Des     Reminder     Subject     FAIChert       0     08026/022     Existing Date-Current Status     Maggie Morre       0     0406/2023     Existing Date-Passood     Mar: David                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Q | NEEDS ATTENTION SOON C <sup>2</sup> Q       [Ive: Reminder     Subject       FNC/Ient     Due                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| DATE CALCULATOR Enter any 2 values to solve missing value Start Enter any 2 values to solve missing value                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | • | REPORTING (2)     C     C     Copyring/Dif     Constance Excel     Edit     Constance     Copyring/Dif     Constance     Copyring/Dif     Constance     Copyring/Dif     Constance     Copyring/Dif     Constance     Copyring/Dif     Constance     Copyring/Dif     Copyring/Di |