9 IMPORTANT IMMIGRATION CASE MANAGEMENT FEATURES
In Covid-19 and Beyond

Immigration practitioners across the US are familiar with the recently tightened immigration restrictions, rapid increases in Requests for Evidence (RFE) and major spikes in denials. Now, since COVID-19, immigration practitioners are wrestling with even more challenges as they fight to keep their organizations thriving into the future.

As the pandemic's effect rippled through the immigration landscape, it should come as no surprise that technology plays a major role in its ability to help organizations lower costs, streamline processes, move cases forward, and ultimately create the safe and sustainable growth that so many immigration practitioners are seeking.

However, when it comes to immigration case management systems, not all systems are created equal, and because choosing the right immigration case management system can be a daunting task, we have described below very specific features that immigration practitioners should take into consideration when selecting such a vital service.

Outlined below are 9 of the important case management features you should take into consideration:

1. Streamlined Electronic Client Intake

A digital, contactless and easy-to-use client portal that enables your Foreign National or Employer clients to login to the system directly, leverage a time-saving document collection workflow, submit important documents and enter information such as: biographical data, address and work history, immigration status, etc. is critical. It can not only reduce data entry time and costs, but it can help increases accuracy and helps enable organizations to more seamlessly capture important information to initiate and process cases, electronically, in less time. Moreover, a client portal will also provide information back to the FN or HR client to help keep them aware of their case status, often reducing frequent emails and calls for case progress updates.

9 Must-Have Case Management Features

- Streamlined Electronic Client Intake
- Access to Current Forms and Questionnaires
- Efficient Workflows and Processes, Tailored to Your Organization
- Access to Standard and Customizable Reports
- Real-time Visibility into Case Status
- Easy-to-use Communication and Collaboration Tools
- Accessible, Nearly Anytime and Anywhere, with Attention to Security
- Decreased Costs and Increased Return on Investment
- Industry Experts Committed to Your Success

2. Access to the Current Forms and Questionnaires

Immigration petitions and applications require a high-level of accuracy and attention to detail, particularly in relation to the submission of required forms and letters. It's essential to leverage a case management system that provides t up-to-date, electronic Forms and smart questionnaires. Moreover, it's important that the case management provider you choose has a team dedicated to carefully monitoring, managing and communicating these Form updates on an ongoing basis.

3. Efficient Workflows and Processes, Tailored to Your Organization

Most immigration cases consist of specific steps and tasks, which must be performed in a sequential and efficient manner. In order to generate efficiencies, it is important that a case management solution is equipped to help synthesize these steps into predefined and customizable workflows that are tailored to the case at hand. For instance, these workflows and processes should help reinforce your policies, encourage uniformity and generate accountability by alerting which tasks have been performed and which tasks require attention.

4. Access to Standard and Customizable Reports

Not only should a case management solution be capable of quickly generating standard reports on important deadlines, milestones and real-time case metrics, but a case management system should be able to produce customizable reports that help track employee performance, spot gaps, trends, and opportunities.

5. Real-time Visibility into Case Status

One of the most critical factors of elevating client satisfaction is the ability to keep clients informed of their immigration matters. This means that it's vital to have a cloud-based case management system in place that enables you to share timely case updates with your clients and other important news that may impact their immigration plans. As an example, a case management system will help facilitate these updates through specialized Foreign National and Employer/HR interfaces that not only capture important information and documents submitted directly by the client, but also provide information back to the FN and HR client to help keep them informed of case progress and status.

6. Easy-to-use Communication and Collaboration Tool

Interwoven with case status visibility, is the capability to communicate and collaborate among employees and with clients. Immigration case management software should not only provide client portals, but also help facilitate form preparation collaboration within the organization by providing document archives, workflows that support more uniformity, efficiency and accountability, oversight control, and more.

7. Accessible, Nearly Anytime and Anywhere, with Attention to Security

Quick access to important case information, privately from anywhere in the world. A true cloud-based immigration case management system enables users to get case status updates, run critical reports, access electronic forms and questionnaires, interact with clients and facilitate new client intake....almost anytime and anywhere. Moreover, with a leading electronic immigration case management system, clients are able to directly enter data into the system, upload important documents, communicate with the organization, and keep their case moving forward.

8. Decreased Costs and Increased Return on Investment

The recent global climate has created numerous obstacles for businesses across the globe, including the immigration world. Now, more than ever, immigration practitioners must get innovative, reduce costs, streamline processes, and create a better client experience. When considering an effective immigration case management system, it's important to consider the true costs of your current processes. For instance, the cost of workflow inefficiencies, reduced new case throughout, and intangible costs like reputation and client satisfaction. When evaluating a new system, immigration practitioners should be able to calculate time saved per case and ROI achieved through more optimized staff productivity and case management performance capabilities. Robust use of an immigration case management solution can help produce tangible results.

9. Industry Experts Committed to Your Success

A case management system provides more than just a service. A case management vendor takes a consultative approach and makes efforts to help your success. From longtime positive engagement in the immigration industry to developing cutting-edge immigration system tools and processes, to successfully leading clients through implementation, training, onboarding and ongoing support, a winning vendor is there for you every step of the way, making it their mission to help make sure your organization is better set-up for success.
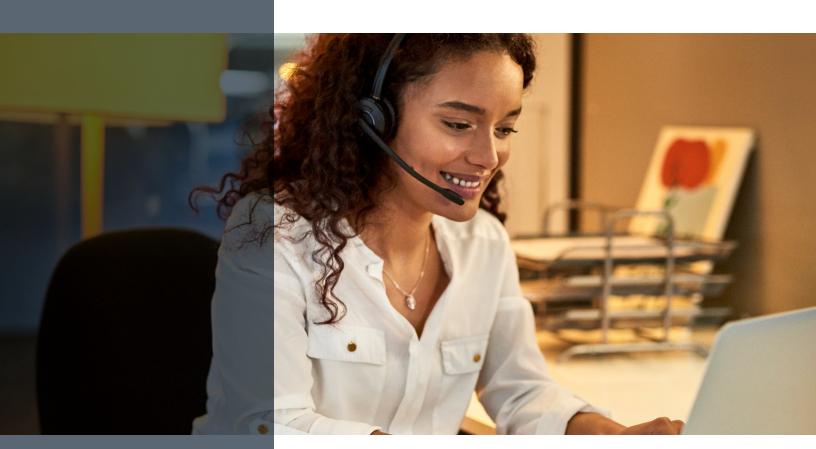
Go Electronic with Immigration Case Management

Leveraging a case management system that doesn't stack-up to your expectations? Select one that will help your organization lower costs, streamline processes, move cases forward, and ultimately help you thrive in the months and years to come. Whether you are leveraging paper, spreadsheets, or another electronic case management system, our team is here to assist your organization in a successful, simple and more stress-free implementation of Immigration Case Management.

Contact us to learn more about how Immigration Case Management Software helps enable more seamless processes and workflows, can help you elevate your client satisfaction, and helps move your organization forward now and in the future.

Speak with an Edge Immigration Case Management Specialist

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