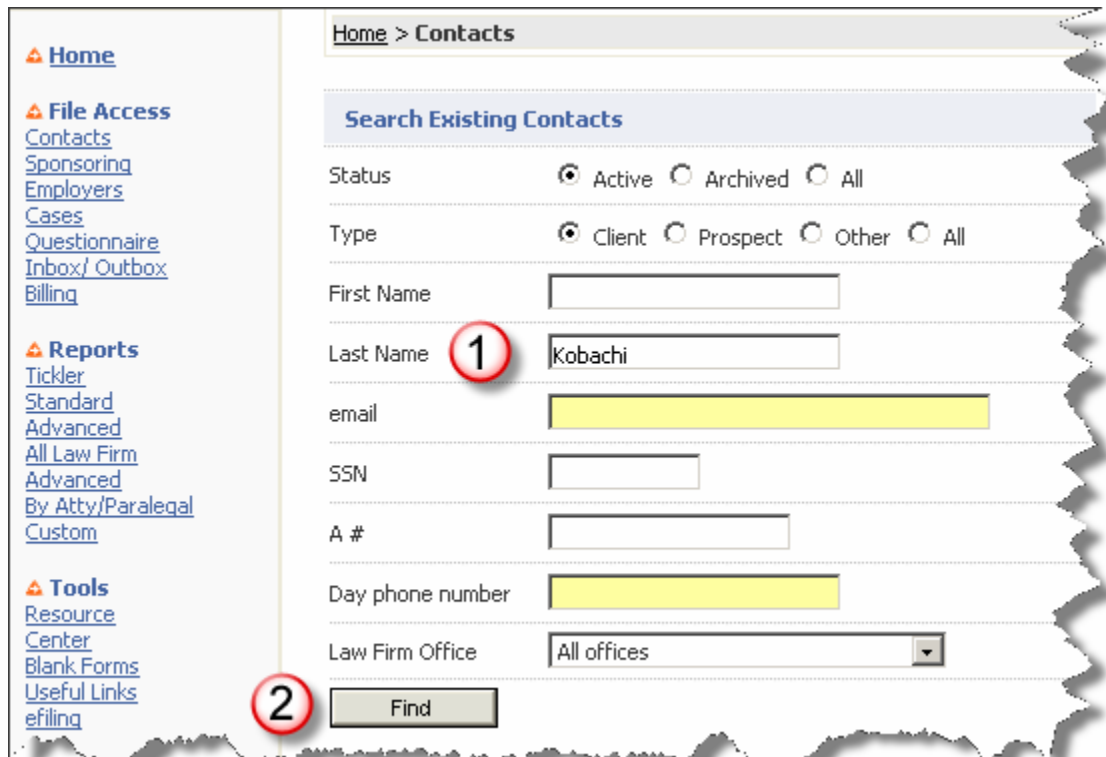


CONTACTS - ADD REMINDERS AND TRACK IMPORTANT DOCUMENTS

There is no “Reminder” TAB in the Contact screen like you have in the Case screen. Instead, the “Personal Information” and “Personal Documents” screens of a Contact Profile allow you to add and track documents and their expiration dates. Similarly, the “Status/Additional Documents” screen allows you to add and track Reminders and other documents and notices.

Let’s start by searching for and opening a Contact’s Profile.



Home > Contacts

Search Existing Contacts

Status Active Archived All

Type Client Prospect Other All

First Name

Last Name **1**

email

SSN

A #

Day phone number















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SEARCH FOR CONTACT NAMED “KOBACHI”

Home > Contacts > Results

Results - 1 to 9 of 9

Actions	Name	DOB	Status	email
 	Ali Kobachi	07/07/1937	Client	
 	Jack KOBACHI	02/14/2000	Client	KAREN@GUCL.COM
 	john KOBACHI		Client	
 	John S KOBACHI	02/12/1960	Client	
 	John S KOBACHI	02/12/1960	Client	johnkobachi@yahoo.com
 	john KOBACHI		Client	
 	John KOBACHI		Client	johnkobachi@yahoo.com

CLICK TO OPEN THE CONTACT PROFILE



Keep Track of Standard Data

Out-of-the-box, EIMMIGRATION offers a fix set of data fields for keeping track of standard documents such as Passport, I-94, Visa, Advance Parole document, I-797

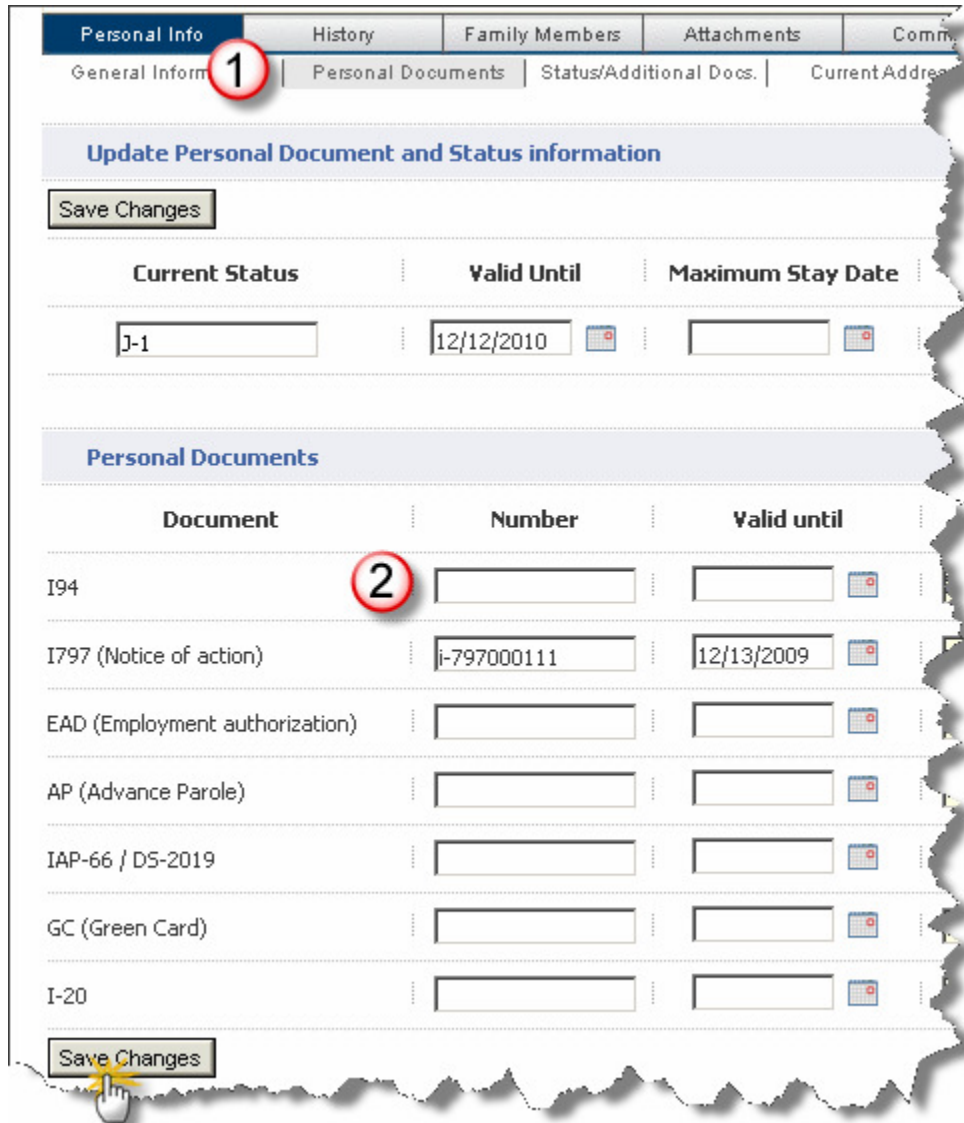
Simply type in the Expiration Date for these documents and EIMMIGRATION will notify you when the expiration date approaches.

In the following example EIMMIGRATION automatically tracks the passport expiration date as soon as you click the "Save Changes" button.

Day phone	<input type="text" value="310-225-3125"/> (123-456-7890)	Cell phone	<input type="text" value="310-555-1313"/>
Evening phone	<input type="text" value="310-555-1414"/> (123-456-7890)	Fax	<input type="text"/> (123-456-7890)
email	<input type="text" value="johnkobachi@yahoo.com"/>	Nationality	<input type="text" value="Iran"/> (Country)
Passport Issuing country	<input type="text" value="Please select a Country"/>	Passport #	<input type="text" value="PN123456789"/>
Passport issue date	<input type="text" value="07/01/2009"/> (mm/dd/yyyy)	1 Passport valid until	<input type="text" value="07/09/2014"/> (mm/dd/yyyy)
Last entry to US	<input type="text"/> (mm/dd/yyyy)	Arrival city	<input type="text"/>
Arrival State	<input type="text"/>		
Major field of study	<input type="text"/>	Degree	<input type="text"/>
<input type="button" value="Save Changes"/>			

CHANGE PASSPORT EXPIRATION DATE AND SAVE

In the following example, user can manage and track the I-94 information. Expiration date is automatically tracked as soon as user clicks the “Save Changes” button.



Personal Info | History | Family Members | Attachments | Comm. |
General Inform | **1** Personal Documents | Status/Additional Docs. | Current Address

Update Personal Document and Status information

Save Changes

Current Status	Valid Until	Maximum Stay Date
J-1	12/12/2010	

Personal Documents

Document	Number	Valid until
I94	2	
I797 (Notice of action)	i-797000111	12/13/2009
EAD (Employment authorization)		
AP (Advance Parole)		
IAP-66 / DS-2019		
GC (Green Card)		
I-20		

Save Changes

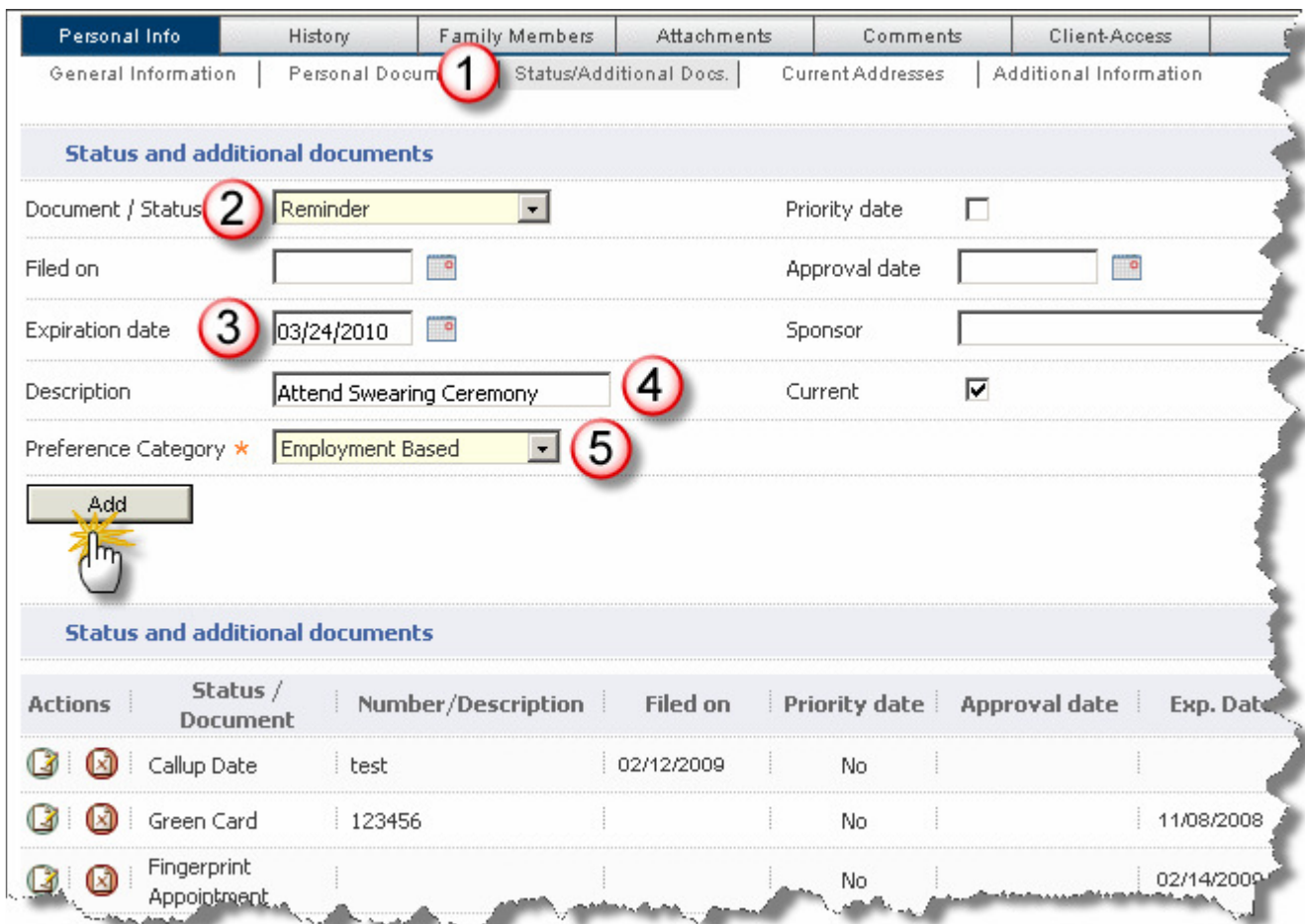
Track I-94 Expiration Date







Keep Track of Custom Data

It is impossible for EIMMIGRATION to, out-of-the-box, accommodate every possible piece of information one would want to keep track of. Therefore, EIMMIGRATION offers a flexible solution that allows you to create and manage a custom list of information you like to manage and track in your practice.

The list could include document data, expiration dates, events or profile information such as Fingerprint Appointment, an LC Approval Notice, Reminder, Call-up Date, Talent/Award, Color of Skin, Motions, etc.













If you want to add an event like a Reminder to the Contact Profile you can follow the steps in the following example.



Actions	Status / Document	Number/Description	Filed on	Priority date	Approval date	Exp. Date
 	Callup Date	test	02/12/2009	No		
 	Green Card	123456		No		11/08/2008
 	Fingerprint Appointment			No		02/14/2009

A 5-step Process to Add a "Reminder" to a Contact Profile

After you click the “Add” button an entry is added to the “Status and additional documents” section as depicted below.

Status and additional documents							
Actions	Status / Document	Number/Description	Filed on	Priority date	Approval date	Exp. Date	Spe
 	Callup Date	test	02/12/2009	No			
 	Green Card	123456		No		11/08/2008	
 	Fingerprint Appointment	At the Orange County field office		No		02/14/2009	
 	Hearing	Deportation Hearing		No		02/14/2009	
 	Motions	Motions to dismiss criminal charges		No		12/12/2009	
 	Reminder	Attend Swearing Ceremony		No		03/24/2010	

NOTE:

- Items listed in the “Document/Status” drop list are fully configurable via the Administrative Console.
- Entries listed under the “Status and additional documents” section are automatically tracked and monitored by the “Tickler” facility of EIMMIGRATION.



Home > Tickler

Document expiration	Process Steps	My Cases
0 - 5 days (0)	0 - 30 days (2)	Ongoing (155)
30 - 60 days (2)	30 - 60 days (2)	Closed (0)
60 - 90 days (1)	60 - 180 days (0)	Archived (0)
Custom	Overdue (16)	

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