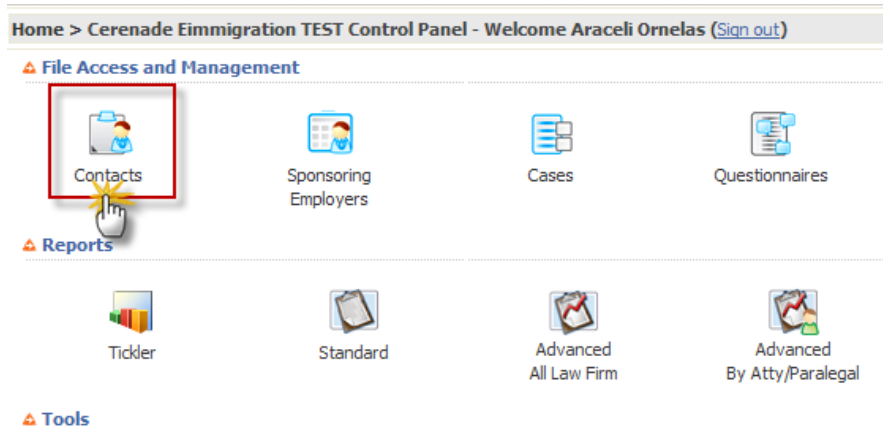
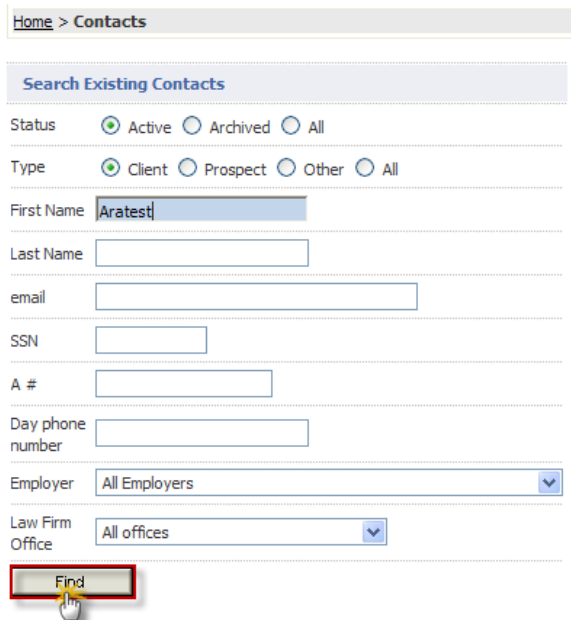


## SETTING UP MEMBERS SECTION FOR A CONTACT

1) Go to **Home** then click on **Contacts**.



2) Search for the client then click on **Find** button.



Home > Contacts

Search Existing Contacts

Status  Active  Archived  All

Type  Client  Prospect  Other  All

First Name

Last Name

email

SSN


A #

Day phone number

Employer



Law Firm Office

**Find**

3) Open the client profile by clicking on the  icon.

Home > Contacts > Results

Results - 1 to 1 of 1 Page 1

Actions	Name	DOB	Status	Employer	email	Dayphone	SSN
 	Aratest ORNTEST	11/09/1972	Client			526-265-3481	646-72-3330

Results - 1 to 1 of 1 Page 1

4) Click on **Members** tab.

Home > Contacts > Aratest ORNTEST

<b>Personal Info</b>	History	<b>Members</b>	Attachments	Comments	Client Access	Cases
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General Information | Personal Documents | **Status/Additional Docs.** | Current Addresses | Additional Information

**Update Biographic Information (Required information \* )**

Save Changes | View Profile

Status \*  Active | Type \*  Client  Prospect  Other

First Name \*  | Last Name \*

Middle Name  | Maiden Name

5) Click on **New Contact** button.

**NOTE:** If you wish to link a member that is ALREADY in the system please click **Link Member**, search for and add the contact and then select the relationship.

Home > Contacts > Aratest ORNTEST

Personal Info	History	<b>Members</b>	Attachments	Comments	Client Access	Cases
---------------	---------	----------------	-------------	----------	---------------	-------

**Members**

**New Contact** | Link Member

Actions	Contacts	Relationship
 	Evatest Castest	Beneficiary
 	Evatest Castest	Alien

Link Atty/Paralegal | Save Changes

Actions	Order #	Attorneys / Paralegals	Type
---------	---------	------------------------	------

6) Enter contact information and click **Save** button when done.

Home > Contacts > Aratest ORNTEST

Personal Info	History	<b>Members</b>	Attachments	Comments	Client-Access	Cases
---------------	---------	----------------	-------------	----------	---------------	-------

**Parties - Create New Contact**

Save Cancel

**Personal Information (Required \*)**

Status *	Client	
First Name *	Ignaciotest	Last Name * CASTTEST
Middle Name		Maiden Name
Title		Other Names
Marital Status	Single	Sex <input checked="" type="radio"/> Male <input type="radio"/> Female
SSN		Alien #
Date of Birth	02/22/1986 <small>(mm/dd/yyyy)</small>	City of Birth

7) Select a **Relation** and click **Link Member** button.

Home > Contacts > Aratest ORNTEST

Personal Info	History	<b>Members</b>	Attachments	Comments	Client-Access	Cases
---------------	---------	----------------	-------------	----------	---------------	-------

**Parties - Create New Contact Details**

First Name	Ignaciotest
Last Name	CASTTEST
Relation	Please select a Relation

Link Member

- Please select a Relation
- spouse
- Fiance(e)
- Son
- Daughter
- Father
- Mother
- Brother
- Sister
- Other

8) New member has been created and linked to the contact.

Home > Contacts > Aratest ORNTEST

Personal Info	History	<b>Members</b>	Attachments	Comments	Client-Access	Cases
---------------	---------	----------------	-------------	----------	---------------	-------

**Members**

New Contact Link Member

Actions	Contacts	Relationship
	Evatest Casttest	Beneficiary
	Evatest Casttest	Alien
	Ignaciotest CASTTEST	Son

9) To link attorney(s) and/or paralegal(s) to this contact, click **Link Atty/Paralegal** button.

Home > Contacts > Aratest ORNTEST

Personal Info | History | **Members** | Attachments | Comments | Client-Access | Cases

---

**Members**

New Contact | Link Member

Actions	Contacts	Relationship
	Evatest Castest	<a href="#">Beneficiary</a>
	Evatest Castest	<a href="#">Alien</a>
	Ignaciotest CASTTEST	<a href="#">Son</a>

**Link Atty/Paralegal** | **Save Changes**

Actions	Order #	Attorneys / Paralegals	Type

---

**Employer**

Save Changes | Please make a selection ▼

**Tips for linking members:**

- \* If you wish to link a member that is NOT in the database yet please click "New Contact", fill out the personal information and then select the relationship
- \* If you wish to link a member that is ALREADY in the database please click "Link Member", search for the contact and then select the relationship

10) Make your selection by clicking on the checkbox and click **Link Atty/Paralegal** button.

Home > Contacts > Aratest ORNTEST

Personal Info | History | **Members** | Attachments | Comments | Client-Access | Cases

---

**Parties - Link Attorney to Contact**

**Link Atty/Paralegal** | **Cancel**

Add	First	Last	Type
<input type="checkbox"/>	Abdullah	Salim	attorney
<input type="checkbox"/>	Aleks	M	attorney
<input checked="" type="checkbox"/>	Ali	Malek	attorney
<input type="checkbox"/>	Andrew	Lerner	attorney
<input checked="" type="checkbox"/>	Araceli	Ornelas	paralegal

11) To link an employer to this contact, make a selection from the Employer droplist. Click **Save Changes** button when done.










Home > Contacts > Aratest ORNTEST

Personal Info | History | **Members** | Attachments | Comments | Client-Access | Cases



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**Members**

New Contact | Link Member


Actions	Contacts	Relationship
  	Evatest Castest	<a href="#">Beneficiary</a>
  	Evatest Castest	<a href="#">Alien</a>
  	Ignaciotest CASTTEST	<a href="#">Son</a>


Link Atty/Paralegal | Save Changes

Actions	Order #	Attorneys / Paralegals	Type
	<input type="text" value="0"/>	Ali Malek	attorney
	<input type="text" value="0"/>	Araceli Ornelas	paralegal

---

**Employer**

**Save Changes** |  



## How Members of a Contact Populate Forms”

1) Click on **Cases** tab.

Home > Contacts > Aratest ORNTEST

Personal Info | History | **Members** | Attachments | Comments | Client-Access | **Cases**

**Members**

New Contact | Link Member

Actions	Contacts	Relationship
	Evatest Castest	<a href="#">Beneficiary</a>
	Evatest Castest	<a href="#">Alien</a>
	Ignaciotest CASTTEST	<a href="#">Son</a>

Link Atty/Paralegal | Save Changes

Actions	Order #	Attorneys / Paralegals	Type
	<input type="text" value="0"/>	Ali Malek	attorney
	<input type="text" value="0"/>	Araceli Ornelas	paralegal

**Employer**

Save Changes |

2) Open a case or create a **New Case**.

Home > Contacts > Aratest ORNTEST

Personal Info | History | Members | Attachments | Comments | Client-Access | **Cases**

**Ongoing Cases**

New Case

Actions	Case Number	Process	Created on	Status
	A99999	I-130 IV	03/30/2009	Ongoing

3) Click on **Forms** tab then open a form.

Home > Cases > Aratest ORNTEST - I-130 IV - A99999

General Info | Attorneys | Parties | **Forms** | Comments | Reminders | Documents | Steps

**Incomplete Forms**

Add Forms | Email Forms | Print Forms


Actions	Form	Form Description	Filing Fee	Print/Email	eFile
	G-28	NOTICE OF ENTRY OF APPEARANCE AS ATTORNEY OR REPRESENTATIVE. [9/26/2000] <a href="#">[Update Description]</a>	\$0.00	<input type="checkbox"/>	
	G-325A	BIOGRAPHIC INFORMATION [07/14/2006] <a href="#">[Update Description]</a>	\$0.00	<input type="checkbox"/>	
	G-325A	BIOGRAPHIC INFORMATION [07/14/2006] <a href="#">[Update Description]</a>	\$0.00	<input type="checkbox"/>	

4) Click on any of the Party On Demand (POD) buttons (the Blue Buttons) available on the form to populate sections of the form with information from Members of Contact.

OMB No. 1615-0008, Exp. 05/31/09

Department of Homeland Security  
U.S. Citizenship and Immigration Services

### G-325A, Biographic Information



**Alien Info goes here**

<b>(Family name)</b> Castest		mm/dd/yyyy) 961		Citizenship/Nationality A	File Number A
All Other Names Used (Including names used in the past)		U.S. Social Security # (if any) SCO		City and Country of Residence	
<b>Father</b> <b>Mother</b> (Maiden Name)	Family	Country of Birth			
Husband or Wife (if none, so state.)	Family	Date of Marriage	Place of Marriage		
Former Husbands or Wives (if none)	Family	Date and Place of Termination of Marriage			
Family Name (For wife, give maiden name)	Family				
Applicant's residence last five years. List recent address first.					

Select Party    Close Window

**Parties**

Select	Party	DOB	Relationship
<input type="radio"/>	NONE (Do not select any Contact)		
<input type="radio"/>	Aratest ORNTEST	11/09/1972	Petitioner

**Family Members ...**

- Arntest ORNTEST      Father
- Evatest Castest      12/22/1964      Beneficiary
- Evatest Castest      12/22/1961      Alien
- Ignaciotest CASTTEST      02/22/1986      Son
- Ignaciotests Juan CASTTEST      Spouse
- Mariatest De La Luz ORNTEST      Mother

#### Related Articles:

How to set case parties and how they populate forms:  
<http://www.cerenade.com/eimmigration/CaseParties.pdf>

For more information and articles, please visit [www.eimmigration.com](http://www.eimmigration.com)