Immigration Case Intake Checklist

Client Background Information

- ☐ Full Name and any Aliases Used
- ☐ Date of Birth and Place of Birth
- ☐ Current Address, Phone Number, and Email Address
- ☐ Preferred Language for Communication

Immigration History

- ☐ Current Immigration Status (e.g., visa type, undocumented)
- ☐ Date of Entry into the U.S. and Port of Entry
- ☐ Travel History (entries and exits from the U.S.)
- ☐ Previous Applications or Petitions filed with USCIS

Family Information

- ☐ Spouse's Name, Status, and Date of Marriage (if applicable)
- ☐ Children's Names, Dates of Birth, and Immigration Status (if applicable)

Documentation Supporting the Desired Relief (varies by case type)

- ☐ Employment documents (for employment-based cases)
- ☐ Military service records (for certain cases)
- ☐ Evidence of persecution (for asylum cases)
- ☐ Police Reports/Court Orders (for VAWA cases)

Additional Information

- ☐ Criminal History (if any)
- ☐ Deportation or Removal Proceedings (if any)
- ☐ Ability to Pay Legal Fees

Optional, but Helpful

- ☐ Referral Source (if applicable)
- ☐ Any Notes or Questions the Client has

About Mitratech

Mitratech has a 35-year history as a leader in providing technology and services that empower organizations to automate compliance, manage risks, increase efficiency, control costs, and scale for the future.

With an increase in remote and dispersed workforces, emerging technology, and rapidly changing regulations, teams across legal, risk, and human resources (HR) are collaborating now more than ever. Mitratech has emerged as the only partner delivering fully automated compliance and transparency across these three critical operational functions.

Mitratech's integrated technology portfolio powers end-to-end talent strategy and predictive HR compliance with world-class solutions for DEI, OFCCP compliance, talent acquisition and workforce analytics, learning and performance management, comprehensive background screening, ethic hotlines & reporting, award-winning I-9 compliance, policy management, and more.

Mitratech serves over 14,000 organizations worldwide, spanning more than 160 countries.

Ready to simplify your immigration case management? Schedule a demo of **INSZoom** today. Discover how our industry-leading solution can save you time, ensure compliance, and provide a seamless experience.

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