

MITR^TECH

10 Questions to Ask Before Selecting an Immigration Case Management System (CMS) for U.S. Case Processing

*Your go-to guide for United States case
processing software.*



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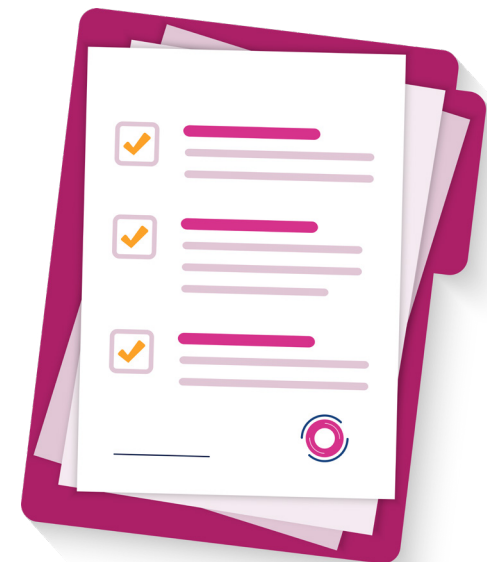
01 Background:

Why use an Immigration CMS?

With hundreds of immigration forms to track— and more appearing under new legislation consistently— [a case management system \(CMS\)](#) is a software that can help organizations ensure quick and hassle-free immigration compliance by empowering them to:

- **Create customized workflows**
- **Monitor filing deadlines**
- **Automate repetitive processes**
- **Consolidate data**
- **Leverage analytics**

According to our [2021 survey](#), however, navigating case management software has been one of the biggest challenges for immigration professionals amid the pandemic. Finding the right end-to-end solution can take time— you have to know what to look for. Without further ado, here are the ten critical questions to ask before selecting an Immigration Case Management System (CMS) for U.S. case processing.



02 10 Critical Questions to Ask

1. Does the system have a user-friendly UI/UX?

According to a [2022 survey conducted by ALM](#), almost a third of participants (29%) believe that up to a quarter of their legal and support staff will continue to work remotely in 2022. With distributed staff collecting information from an inflow of foreign nationals and clients globally, having a central repository for all data is critical for visibility and real-time collaboration. The right CMS should allow you to:

- **Easily assign attorneys and paralegals to each case**
- **Set automated alerts to ensure form submission deadlines are met and cases are moved forward**
- **Search from a library of data to find cases based on their contacts, case numbers, etc.**
- **Add a new user at any time**
- **Access detailed user and access management protocols**
- **Enable multi-factor authentication for immaculate applicant data security**



An easy-to-use interface where all administrative tasks can be managed centrally allows you to adjust, maintain, and expand the use of the platform without the need for costly vendor or partner support, making the CMS a better long-term investment.

2. Does the platform offer digital questionnaires out of the box?

Knowing that questionnaires are the preferred mode of data collection by Case Managers, many CMS platforms will offer digital questionnaires to streamline and accelerate the information-gathering process. But it's essential to look a little deeper at the quality of these forms; are they generic or form-based? The latter is preferred because it can help intuitively organize your case information to ensure compliance. It's also important to know whether or not you can merge multiple questionnaires or create custom questionnaires based on your unique requirements.

3. Does the platform offer maintenance and auto-population of USCIS, DOS, DOL, CBP, ICE and EOIR forms?

With thousands of immigration forms and documents to oversee, staff can spend countless hours compiling, completing, vetting, and updating data. A CMS can offer a complete and comprehensive library of forms to save time and streamline compliance. The right solution will monitor government sites and constantly make updates of each new change within 24-48 hours of government release to ensure your compository is as up-to-date and accurate as possible.



4. Are all online government forms available for e-filing?

Not only should e-filing any online government form be made simple by your immigration CMS, but the data transfer from your form to the e-filing site must be secure. No hidden processes. No data gaps. Just straightforward e-filing for all forms and petitions with updates available to you in real-time. Which government forms should you check to see are available for e-filing? Here's a good place to start:

- **PERM**
- **NI Visa Application**
- **I-130**
- **I-90**
- **N-400**
- **FLAG**

5. How configurable is the system?

Will you have the option to customize process workflows, document checklists, digital questionnaires, portals and other critical capabilities according to your business' unique needs? With constantly-evolving regulations, it's important to have control over the end-to-end case management process to ensure optimal performance and scalability. Be sure to look for a cloud-based platform that can handle increasingly complex and fluid requirements.



6. Does the platform offer email & calendar sync?

Platforms like Outlook and Gmail are well-known standards of corporate communication, with the latter boasting a staggering [1.8 billion](#) users worldwide and growing. For a case management system to ensure a single source of truth and real-time visibility, integration with current technologies is critical. Look for a highly-scalable platform that can support integration with the external applications your team uses the most.

7. Does the platform offer access to the Foreign National and Corporate client via portals to collect sensitive data and documents, manage case status updates, etc.?

A quality Immigration CMS will empower its users with the flexibility to set up customized portals for each Corporation and their Foreign Nationals, providing ample management capabilities to create roles and users with specific privileges and access rights within those portals. It's important to have the ability to enable and disable access internally for additional security, and admins should have the flexibility to provide report access to corporation users by role type.



8. Does the system have integration options with payment processing solutions?

A CMS that integrates with payment processing makes it secure and straightforward to accept online payments for invoices. Using an intuitive billing module and integrations with payment processing platforms—like [LawPay](#)—legal teams can request customers to pay online or over the phone while all payments are logged through the system for optimal visibility. While clients delight in a seamless and secure payment experience, teams can reduce manual billing efforts and invest time more strategically in key business objectives.

9. Does the system have integration options with accounting solutions?

Keeping all of your financial data in one place can improve efficiency, transparency, and collaboration between Case Workers, Attorneys, Bookkeepers, and Billing teams. By syncing your payments between your CMS and an accounting solution like [QuickBooks Online](#), your team can improve tracking for receivables and prevent revenue leakage.



10. Will the platform be able to meet my business needs for at least 3-5 years?

Adaptability, resilience, and the ability to scale are everything. Look for a highly-configurable and progressive case management system that can evolve alongside your own growth trajectory— one that can meet the unique business needs of today and tomorrow. The right platform will continue to offer co-innovation opportunities as you scale.



03 Summary and Next Steps

While there are many questions to ask about an immigration CMS and nuances according to your unique business needs, it's important to check that your solution offers the foundational benefits of:

- **Intuitive UI/UX**
- **Form updates & auto-population**
- **Easy-to-use e-filing**
- **Deep configurability**
- **Scalability**
- **Flexible integrations**

While often overlooked, key features like form-based questionnaires and automatic maintenance of government forms can save your team time, mitigate error, and help streamline the compliance process. Most importantly, a comprehensive, secure, and cloud-based immigration software solution can enhance the case management experience for attorneys, corporations, and immigration applicants. By practicing due diligence, finding the right CMS will not only benefit your clients, but accelerate your workflows and drive unparalleled productivity.



About Mitratelych

Mitratelych is a proven global technology partner for corporate legal, risk & compliance, and HR professionals seeking to maximize productivity, control expense, and mitigate risk by deepening operational alignment, increasing visibility, and spurring collaboration across their organization.

With Mitratelych's proven portfolio of end-to-end solutions, organizations worldwide are able to implement best practices and standardize processes across all lines of business to manage risk and ensure business continuity.

Mitratelych serves over 1,500 organizations worldwide, including 30% of the Fortune 500 and over 500,000 users in 160 countries.

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