Equifax Immigration Case Management (ICM)

Power User Workshop 2025 for CLINIC Affiliates

Wednesday, May 28, 2025

Workshop Agenda

Time	Session Title	Session Abstract
8:30 am - 9:15 am	Getting Started	Learn the essentials of the Equifax ICM system: system navigation, personal settings, searching, case creation, and Dashboard configuration.
9:15 am - 10:00 am	Client Intake & Questionnaires	Implement effective client intake using our Consultation and data collection tools, and learn how to track Consultation conversions.
10:00 am - 10:15 am	Break	
10:15 am - 11:00 am	Document Collection & OnDocs	Receive documents securely from your clients with our easy-to-use FN portal and keep them organized using OnDocs.

11:00 am - 11:45 am	Drafting Forms	Leverage the relational database of ICM to automatically populate your forms, and securely send forms to clients using the FN Portal.
11:45 am - 12:45 pm	Lunch	
12:45 pm - 1:45 pm	Activities & Case Management	Keep track of your cases by logging important events using Activities, inputting Receipts, adding Case Notes, and enabling Reminders to track important deadlines and expirations.
1:45 pm - 2:15 pm	Visa Priority Tracking & Dependent Management	Take advantage of the integration with the Visa Bulletin by having ICM keep track of your client's Visa Priority date. Learn how to properly set up and process cases for dependents, and how to link family members.
2:15 pm - 2:30 pm	Break	
2:30 pm - 3:00 pm	Office Integrators & Document Templates	Log important client emails in ICM using our Microsoft Outlook add-on, easily draft supporting letters using our Microsoft Word add-on, and gain quick insights in to your client data using FN Summary templates.
3:00 pm - 4:00 pm	Case Status & Expiration Reports	Gain key insights in to case status, and monitor client status and expirations, using the powerful Reporting module. Create custom reports from a vast selection of columns and filters, and quickly generate new report templates using the Duplicate feature.