

MITRATECH

Unlocking Efficiency in Global Immigration: 10 Questions for Your CMS Search

*Your go-to guide for vetting global
immigration case processing software.*



Table of Contents

- 3** Why Use an Immigration CMS?
- 5** 10 Critical Questions to Ask
- 13** Summary and Next Steps
- 14** About Mitrtech

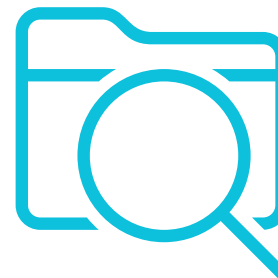
Why Use an Immigration CMS for Global Case Processing?

In the wake of macroeconomic shifts and an increased focus on remote work, the immigration space is seeing a substantial rise in the number of global digital nomads, or individuals who live a lifestyle of high-mobility without a permanent home, job, or strong ties to their country of origin.

Digital nomads come from all over the world – across every generation and gender. In 2023, over half of digital nomads are shown to be from the United States (52%), followed by the United Kingdom (8%), Russia (5%), Canada (4%), Germany (3%), and France (3%).¹

Even as global mobility takes off, immigration barriers continue to put pressure on corporate immigration and global mobility professionals to ensure compliance, reduce costs, and maintain excellent service delivery. In the last year, a staggering 82% of employers saw a foreign national employee forced to depart the U.S. because they were unable to obtain or extend an employment-based visa.²

Organizations that deal with the fine print and forms of immigration law – whether an immigration law firm or the immigration desk of a major corporation – are facing increasingly complex and fluid requirements. That is why strategic immigration professionals from organizations of all sizes and types look to software solutions capable of simplifying immigration case management and compliance.



¹ Evisa.Express. (2023). Digital Nomads – Statistics [2023]. [Digital Nomads – Statistics \[2023\] \(evisa.express\)](#)

² ibid.

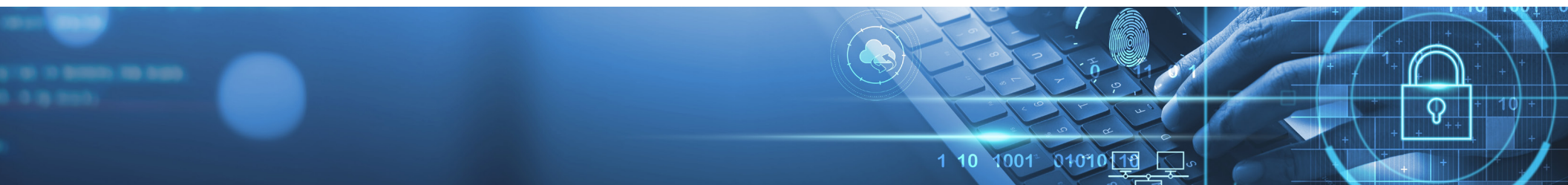
A case management system (CMS) is a software that can help organizations ensure quick and hassle-free immigration compliance by empowering them with the ability to:

- ★ Create customized workflows that accelerate processing
- ★ Securely gather, store, and access digital files
- ★ Track case phases/milestones and set reminders for filing deadlines
- ★ Automate repetitive processes to reduce manual data entry
- ★ Track expiration dates of immigration documents
- ★ Create a single source of data and leverage analytics

Selecting an immigration case management platform is a long-term, strategic decision for any law firm and corporation focused on efficiency and compliance.

Whether your organization supports immigration programs to North America, Asia-Pacific, Europe, or another region of the world, you should expect an immigration CSM that provides a seamless user experience, delivers a high return on your investment, and drives continuous improvements.

Don't settle for subpar tech or unsustainable in-house solutions. We've got you covered with 10 critical questions to ask before selecting an immigration Case Management System (CMS) for global case processing.



10 Critical Questions to Ask

1. Does the system have a user-friendly interface (UI/UX) that empowers users to collaborate, delegate, and easily report across all countries?

With distributed staff collecting information from an inflow of foreign nationals globally, having a central repository for all data is critical for visibility and real-time collaboration.

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.

- ★ Easily assign attorneys, paralegals and other stakeholders to each case
- ★ Build custom templates, including workflows, document checklists, and more
- ★ Configure email and letter templates for auto-population
- ★ Set automated alerts to ensure form submission deadlines are met
- ★ Search from a library of data to find cases based on case contacts, file numbers, etc.
- ★ Leverage powerful communication tools
- ★ Enable multi-factor authentication for immaculate applicant data security
- ★ Access centralized reporting for immigration cases to all countries

2. Does the platform support your case managers and your clients?

Speaking of user-friendly UX/UI, a highly-configurable end-user experience that accommodates case managers, foreign nationals and corporate stakeholders is mission-critical. A quality immigration CMS will empower its users with the flexibility to set up customized portals for each corporate client and their foreign nationals, providing ample management capabilities to create roles and users with specific privileges and access rights. It's important to have the ability to enable and disable access for additional security, and admins should have the flexibility to provide reporting access to corporate users by role type.

Look for a platform that supports:

1. A configurable foreign national portal that empowers foreign nationals to:

- Sign digital e-consents
- Complete digital questionnaires
- Upload documents
- Check case status
- View document expiration dates, scheduled meetings, and more!



2. A customizable HR/corporate user portal that offers users the ability to:

- Sign digital e-consents
- Complete digital questionnaires
- Upload documents
- Check case status for an individual foreign national (or multiple FNs)
- Run reports
- Initiate new case requests

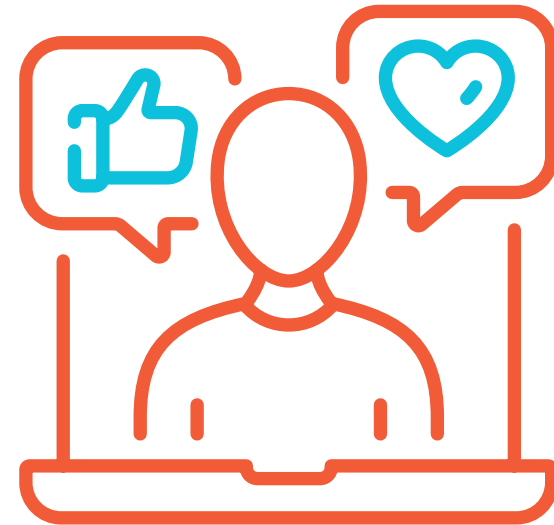


3. Does the platform offer customizable digital questionnaires?

Digital questionnaires are the preferred mode of data collection by case managers, and many CMS platforms offer them to streamline and accelerate the information-gathering process. But it's essential to look a little deeper at the quality of this capability.

Look for digital questionnaires that offer:

- ✦ Functionality to merge multiple questionnaires into one to increase efficiency
- ✦ Customizable questionnaires that can be configured based on your unique requirements
- ✦ Native translation integration to accommodate a diverse clientele



4. Does the platform offer end-to-end document management?

Over 20 years ago, the International Data Corporation (IDC) found that knowledge workers were spending over two hours per day searching for information³ – the equivalent of one full day per week. Flash forward to today, and teams worldwide are still struggling with time management when it comes to storing and accessing documents.

An increase in the technology used to gather and store data has created information silos. Is the file you are looking for on your desktop, on your company's intranet or your department's sub-intranet, in your Google drive, or in your email? An additional consideration is whether the documents are being received, used, and shared securely.

With thousands of immigration forms and documents to oversee, staff spend countless hours compiling, completing, vetting, and updating data. Organizations must have the ability to organize virtual filing cabinets, with the ability to store all types of documentation electronically and make that information available instantly to anyone who is allowed to view it.



³ Feldman, Susan. Sherman, Chirs. (2001). "The High Cost of Not Finding Information." [2996_rev.qxd \(computhink.com\)](#)

Look for a platform that offers unlimited data & document storage.

A global CMS with integrated document management capability offers complete and comprehensive visibility into all immigration documents, backed by robust security permissions, to ensure data integrity and full compliance. Moreover, an excellent platform will allow you to use the gathered documents to assemble the immigration application digitally, and review it prior to submission.



Gut check:

- ★ Does your CMS elevate your end-to-end document management? Make sure it includes:
- ★ Complete and comprehensive visibility into all immigration documents
- ★ Robust security permissions that ensure data integrity and full compliance
- ★ Automated digital immigration applications that gather and assemble stored documents
 - Do these digital applications have an automated review prior to submission?



² Feldman, Susan. Sherman, Chirs. (2001). "The High Cost of Not Finding Information." [2996_rev.qxd \(computhink.com\)](#)

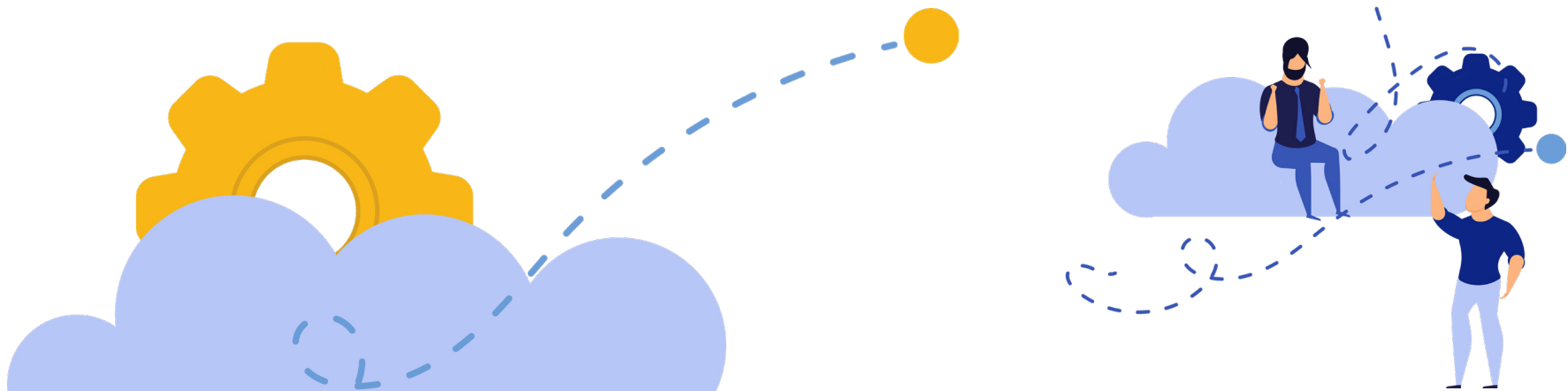
5. Is the system flexible and secure?

Whether a corporation outsources 5% or 100% of immigration support to outside counsel, in case of an audit, the company remains responsible for compliance. The best way to defend yourself during an immigration audit is to be proactive, and have established policies. As budgets continue to shrink, forward-thinking companies are gaining peace of mind that they are “audit-ready” by leveraging technology.

To help you stay one step ahead of constantly-evolving regulations, it's important to have control over the end-to-end case management process. Assess whether you will have the option to customize process workflows, document checklists, digital questionnaires, portals, and other critical capabilities, according to your business' unique needs.

Be sure to look for a cloud-based platform that can handle increasingly complex and fluid requirements, with support for:

- ★ Single sign-on
- ★ Multi-factor authentication
- ★ Pendor/partner access control
- ★ GDPR compliance
- ★ Your commitment to data privacy & more



6. Does the system allow for the creation of automated events?

A best-in-class CMS makes it easy and intuitive to add automated events to workflow steps for a specific case type, driving forward the intended action of end users through an efficient and compliant workflow.

By automating events, the case management process becomes faster, and the end user experience is improved. By reducing manual, repetitive tasks, case managers are free to spend more time on critical tasks, such as relationship building, strategizing, and tracking important deadlines.



7. Does the system support advanced reporting capabilities?

Data is the backbone of all operational improvements, which means today's immigration professionals need access to key performance trends, status reports, and centralized dashboards that are easy to customize and share amongst partners, managers, HR/Corporation users, caseworkers, and more. The right CMS platform will improve your data visualization with tables, maps, charts, and graphs, empowering you with the ability to:

- **Access key operational data points such as case load, case status, case management activities, etc. in one place**
- **View the status and expiration by case manager, by corporation (for employment-based case), by case-type, within a time-period, etc.**
- **Easily customize, save, and share reports with other case managers and end users**
- **Improve workload management and collaboration between stakeholders**

8. Does the technology partner offer ongoing learning and support?

A resilient CMS platform will consistently drive new value through ongoing updates and enhancements, so you can continue improving after your first success. Be sure to partner with a reliable, global provider that ensures ongoing support through:

- ★ Easy access to short training video clips
- ★ Detailed capability articles
- ★ Continuous adoption improvement via ongoing training webinars, and other tools

9. 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 for many years to come. The right platform will offer co-innovation opportunities as you scale.

10. Does the platform offer email & calendar sync?

Platforms like Outlook and Gmail are well-known standards for corporate communication, with the latter boasting a staggering [1.8 billion](#) users worldwide and growing.⁴

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.

⁴ Finance Online. (2022). Number of Active Gmail Users 2022/2023: Statistics, Demographics, & Usage. [Number of Active Gmail Users 2019 & 2020: Statistics, Demographics, & Usage - Financesonline.com](#).

Summary & Next Steps

While often overlooked, key features like customizable workflows and questionnaires can save your team time, mitigate errors, 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 foreign nationals. By practicing due diligence, finding the right CMS will not only benefit all stakeholders, but accelerate your workflows and drive unparalleled productivity.



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 interface (UI/UX)
- Customizable workflows and questionnaires
- Document management
- Event automation
- Extensive security and configurability
- Scalability
- Flexible integrations

About Mitrately

Mitrately is a proven global technology partner for corporate legal, GRC, and HR teams seeking to maximize productivity, decrease costs, and mitigate risks by deepening operational alignment, increasing visibility, and spurring collaboration across their organizations. By partnering with customers to design, develop, deliver and support the best legal, GRC, and HR software solutions on the market; Mitrately enables departments to become hubs of efficiency, innovation and excellence for the entire organization.

Mitrately's Platform provides expert product offerings to organizations worldwide, supplying end-to-end solutions that enable them to implement best practices and standardize processes across all lines of business, as well as effectively manage risks and ensure business continuity.

Mitrately serves over 10,000 organizations worldwide, spanning more than 160 countries.

For more info, visit: www.mitrately.com

The Mitrately logo features the word "MITR" in a dark blue font, followed by a stylized blue triangle pointing to the right, and then "ATECH" in a light blue font.

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