LawLogix

An Equifax Company

LawLogix Immigration Case Management (ICM)
Power User Workshop 2023 for CLINIC Affiliates

Wednesday, May 17th, 2023

Join us in-person for our annual CLINIC Edge Power User Workshop! Whether you're a new or seasoned user, you're sure to learn something new during our 1-day live training, offered FREE this year as part of the annual CLINIC Convening. After the workshop, take the optional Certification Assessment to obtain or upgrade your user certification status.

Time (AZ MST)	Session Title	Session Description
9:00am - 9:45am	Getting Started	Learn the essentials of the LawLogix ICM system: system navigation, personal settings, searching, case creation, and Dashboard configuration.
9:45am - 10:30am	Client Intake & Questionnaires	Implement effective client intake using our Consultation and data collection tools, and learn how to track Consultation conversions.
10:30am - 10:40am	**Break**	
10:40am - 11:15am	Document Collection & OnDocs	Receive documents securely from your clients with our easy-to-use FN portal and keep them organized using OnDocs.
11:15am - 12:00pm	Drafting Forms	Leverage the relational database of Edge to automatically populate your forms, and securely send forms to clients using the FN Portal.
12:00pm - 12:45pm	**Lunch**	
12:45pm - 1:30pm	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.
1:30pm - 2:10pm	Visa Priority Tracking & Dependent Management	Take advantage of the integration with the Visa Bulletin by having Edge 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.
2:10pm - 2:20pm	**Break**	
2:20pm - 3:10pm	Office Integrators & Document Templates	Log important client emails in Edge using our Microsoft Outlook add-on, easily draft supporting letters using our Microsoft Word add-on, and gain quick insights into your client data using FN Summary templates.
3:10pm - 4:00pm	Case Status & Expiration Reports	Gain key insights into 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.

Presenter: Robert Reaume, Solution Consultant

Bio: Robert has been with LawLogix for over 6 years and is responsible for implementing the LawLogix ICM system for clients and providing system training to users. Robert has collaborated with hundreds of non-profits, law firms and corporations to help them get the most out of system. He works closely with organizations to understand their unique needs and customizes the ICM solution to effectively integrate into their operations.