B · A · L

Employee Guide

Cobalt Guide

Table of Contents

1. Creating Username and Password

Receive an email from **No Reply** with the subject line **BAL User Registration**.

Dear Barry,

You have been enabled for access to Cobalt™, Berry Appleman & Leiden's secure, clients-only case information website.

To access Cobalt™, please follow the steps below.

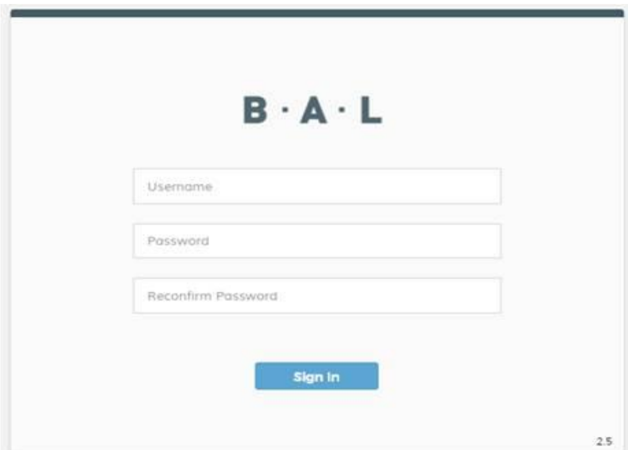
1. Click the following link or copy the link to your browser's address line:
https://cobalt2.balglobal.com/#/login/activate/c2fb8e62-2710-4598-9dd9-982fec45d64c/
2. Select your username and password.
3. The home page will display a summary of active cases requiring your actions; you may view more detailed information by clicking on an individual case.

If you cannot access your account, or have any further questions, please contact us and we will be happy to assist you.

Regards,
Berry Appleman & Leiden

BAL complies with the U.S.-Swiss Safe Harbor Framework. To view BAL's certification and privacy policy, please visit http://www.balglobal.com/home/privacypolicy.aspx

Click on the link and be directed to Cobalt V2.



Create a username and password.

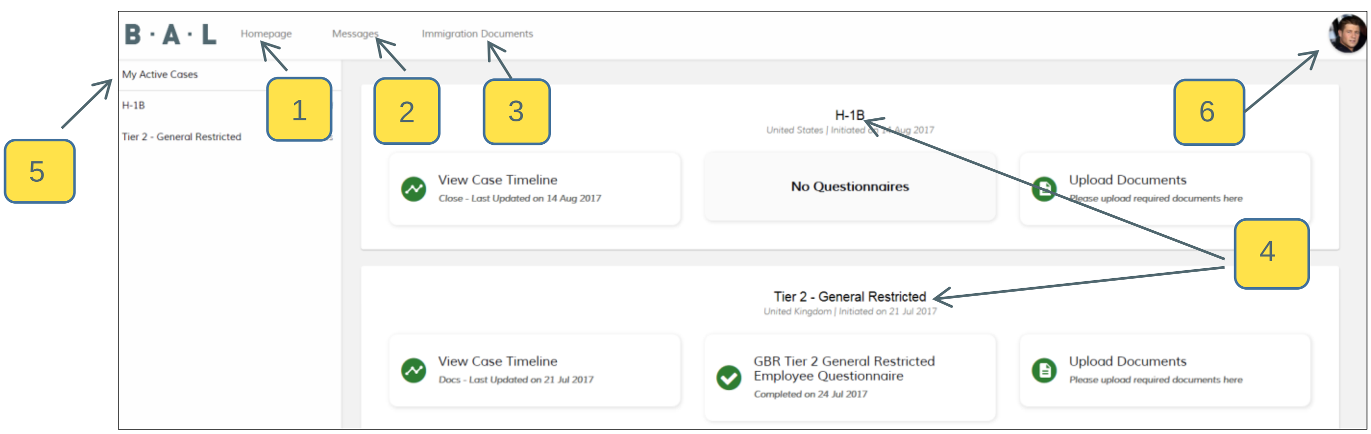
Please make sure the password contains:

- Minimum of eight characters
- At least 3 of the following 4 character classes
- at least one lower case letter
- at least one upper case letter
- at least one number
- at least one symbol

2. User Profile

Navigate to the Cobalt site and proceed to login by typing in your username and password.

Cobalt Homepage

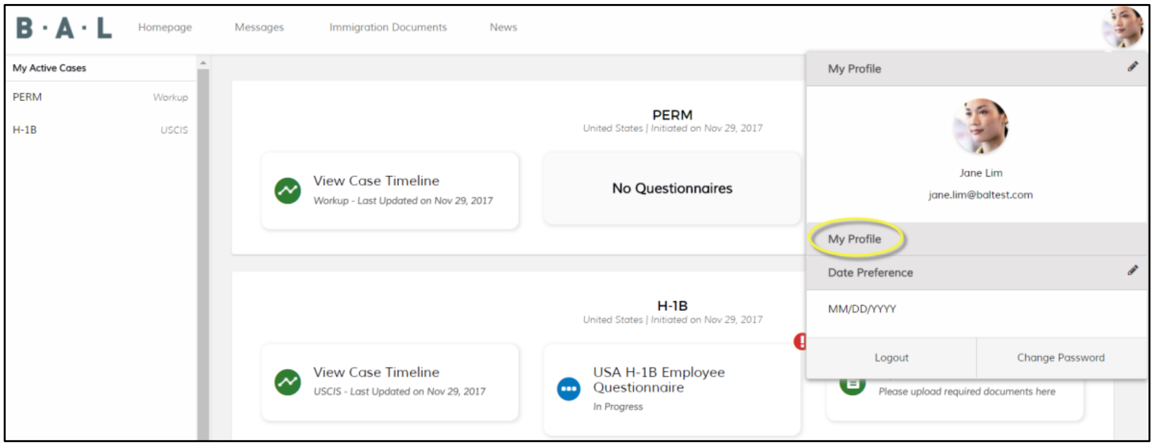


Homepage Section:

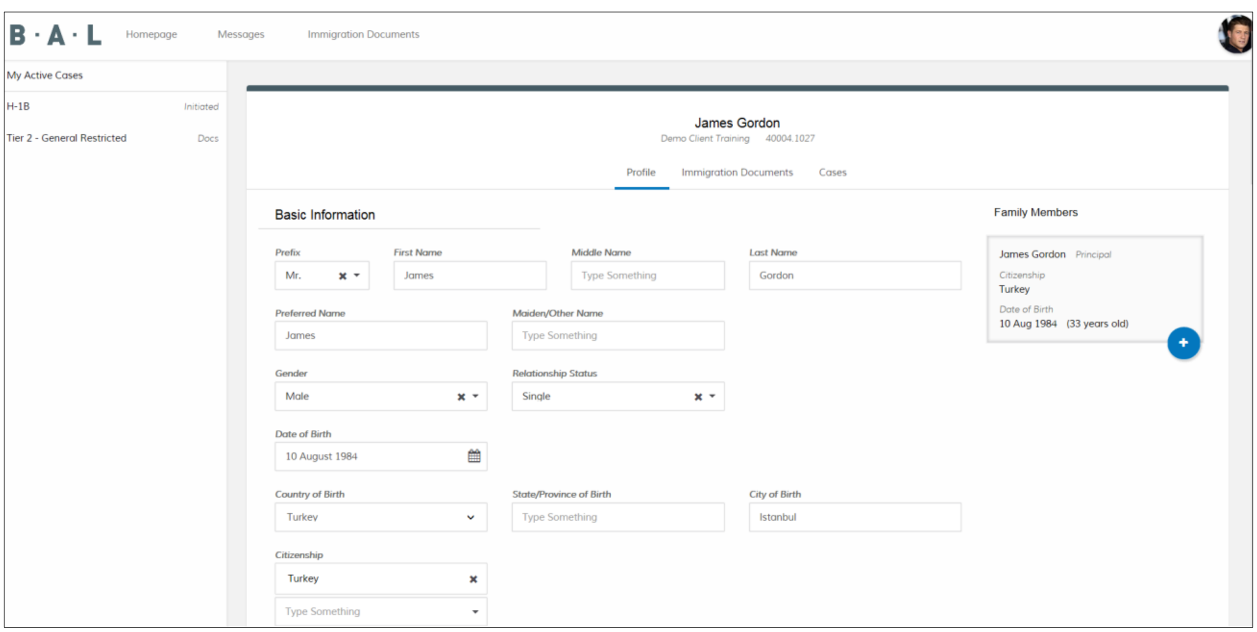
1. Returns you back to your homepage.
2. View your secure messages.
3. View immigration documents.
4. View overview of active cases.
5. View list of active cases.

6. View user's personal profile.

Profile

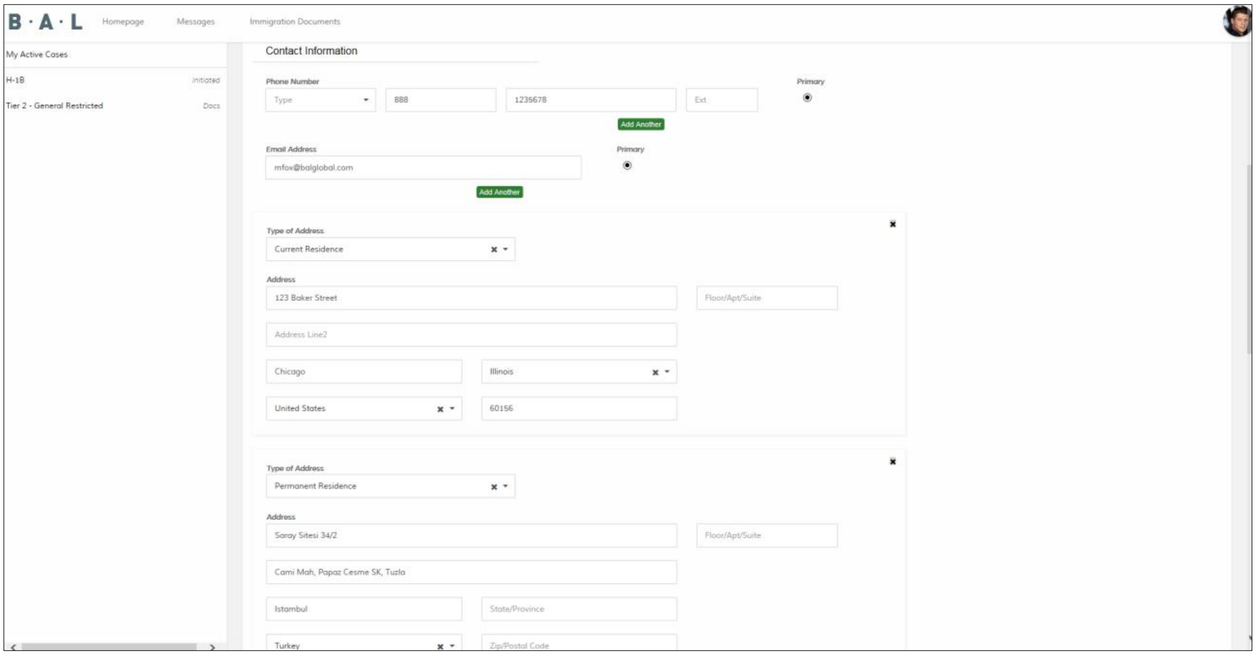


- User profile is located in top right hand corner of window.
- User profile icon allows user to upload profile picture by clicking the pencil icon.
- Displays name, email address.
- "My Profile" allows user to view and edit personal information.
- Allows user to change password (if needed).
- Allows user to logout when ready.



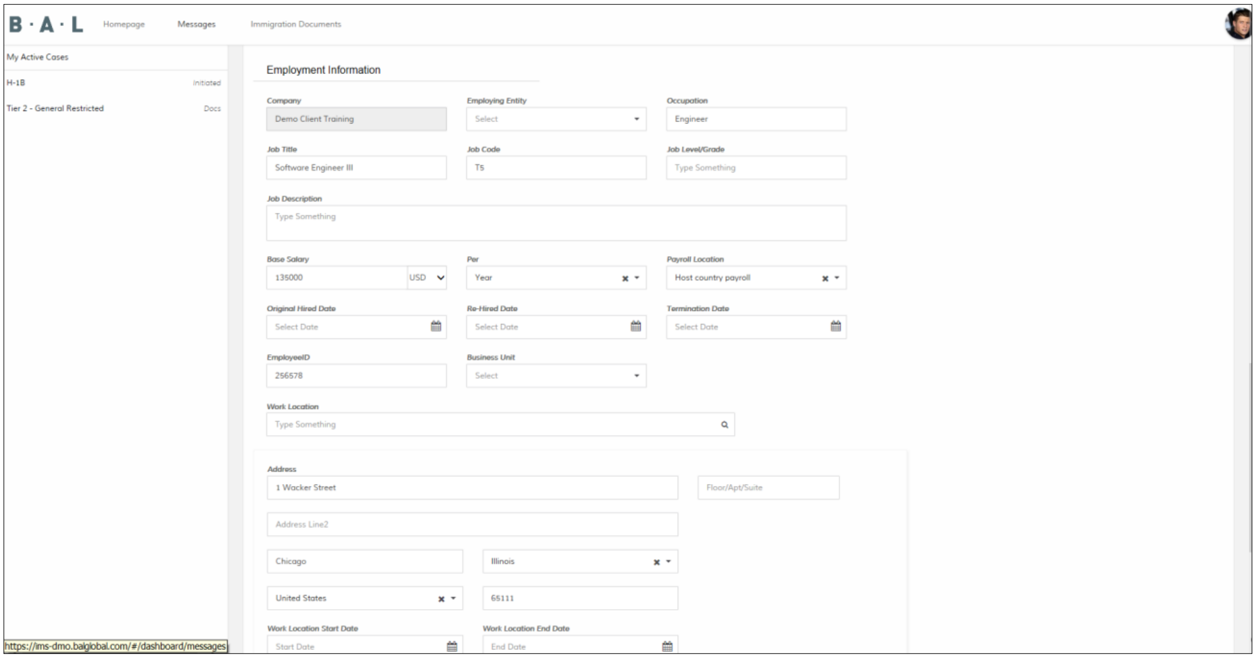
➢ Basic Information:

- ✓ Allows user to edit: name, gender relationship status, date of birth, country of birth, city of birth, and citizenship.



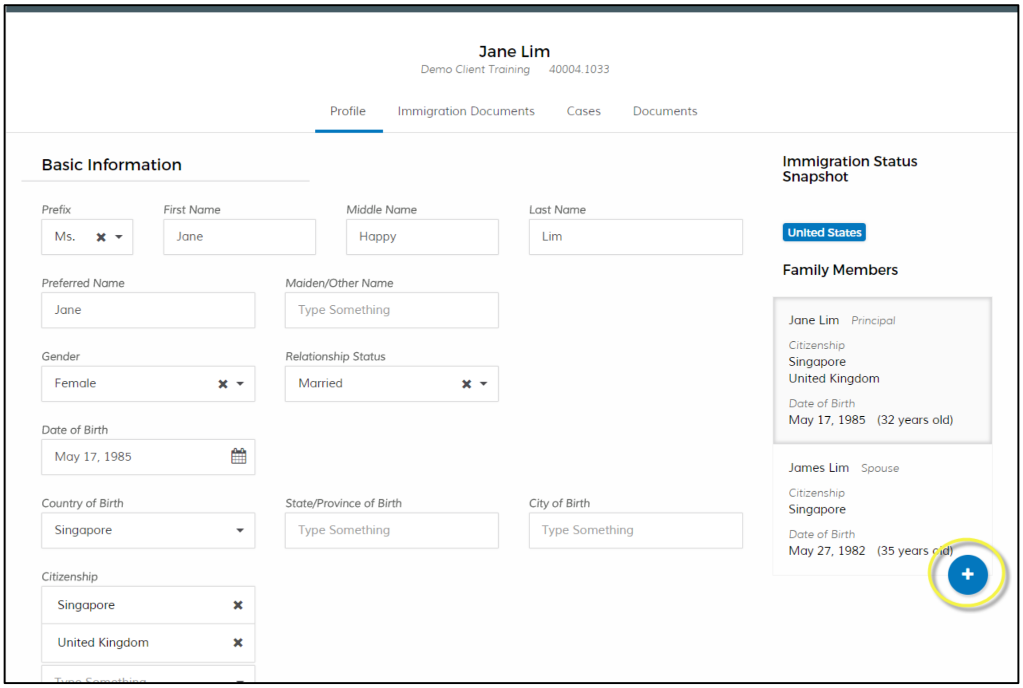
➢ Contact Information:

- ✓ For phone number or email address, the user has the ability to add multiple contact points. One designated phone number / email address can be made the primary by selecting the radio button for “primary.”
- ✓ For address the user is able to select a current residence, mailing address or permanent residence from the drop down menu. You can add each type of address.



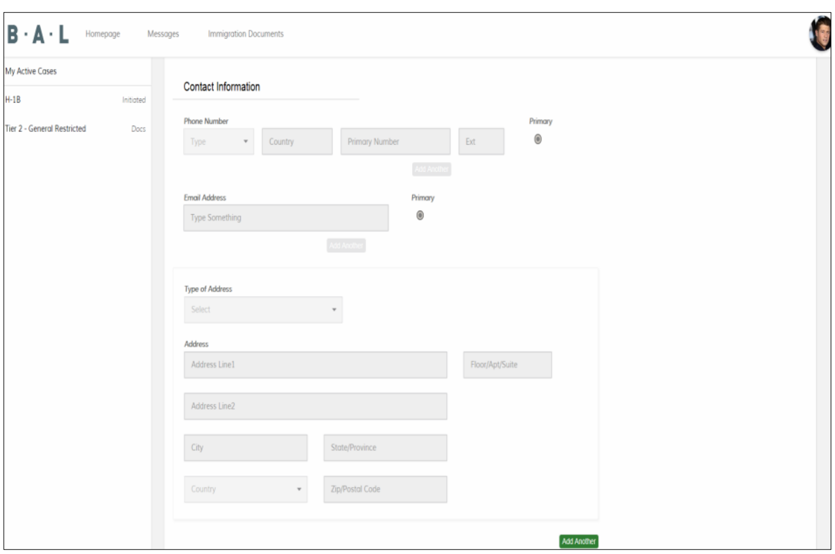
➢ Employment Information:

- ✓ Employing entity is a drop down menu that will pull in information from the company profile level.
- ✓ Occupation and job title are free text fields.
- ✓ Salary information allows you to list the base salary, the currency, and how often that salary is issued. Currently the currency type defaults to USD so be sure to change it as needed.
- ✓ You can search for existing company work locations by using the work location search field. When you click on it you will see a list of all of the work locations that have been entered into the company profile and then you can type to return the specific address you are looking for. It will search any part of the address to narrow down the search criteria. Once you have selected an address, it will populate in Work Location field.



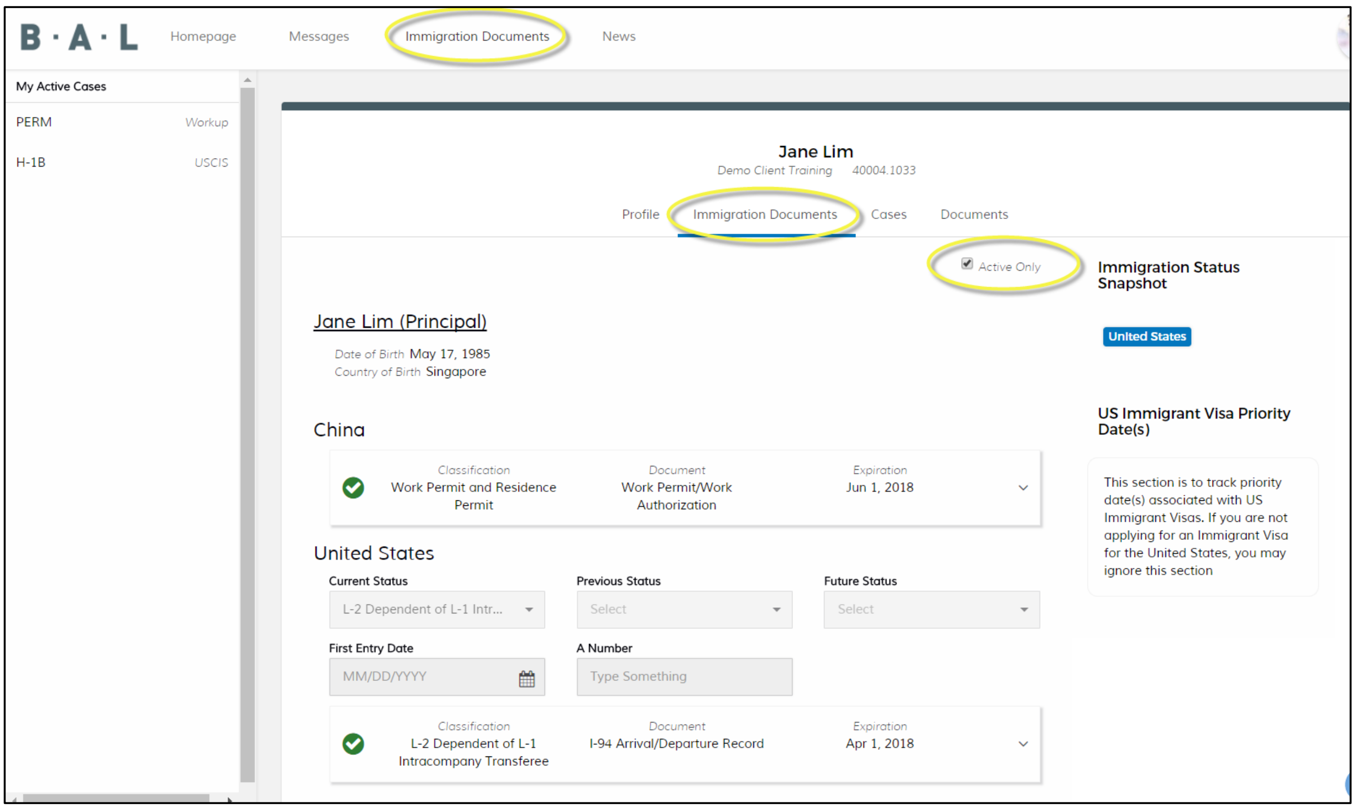
➢ Family Members:

- ✓ Can be added by clicking on the + sign on the right hand side corner of the profile window.
- ✓ It will display the individual's basic information (including contact details) as inputted by the user. Employees have the ability to update these fields.
- ✓ Each entry will save automatically and the family member will display under the principal profile window.



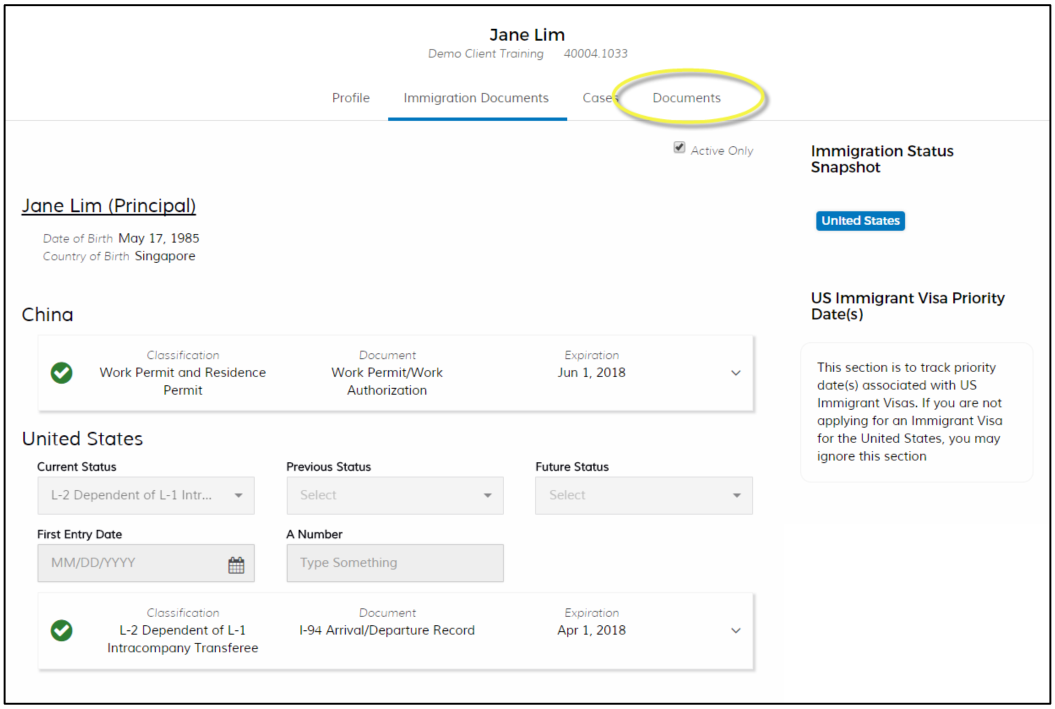
3. Immigration Documents

- Immigration documents can be accessed in two ways: through Immigration Documents from the profile page or from the homepage menu options
- Both links direct user to the same page to view documents only (not edit)
- To view inactive documents, unclick the “Active Only” box
- The user can upload documents at the project level under the “cases” link or on the documents link

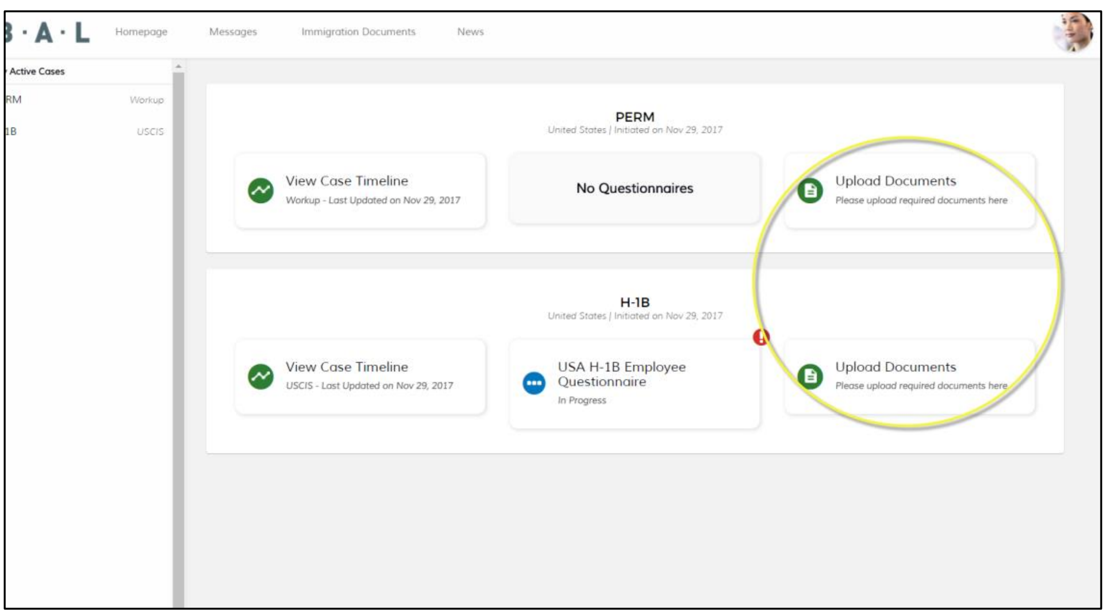


3. Uploading Documents

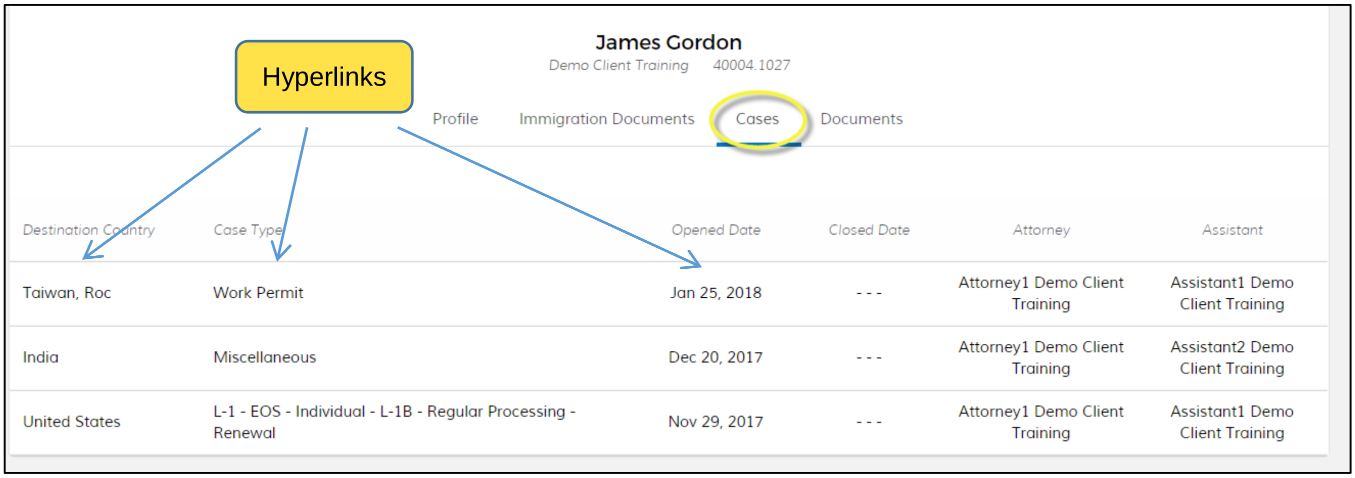
➢ Click on the documents link to bring up the upload page

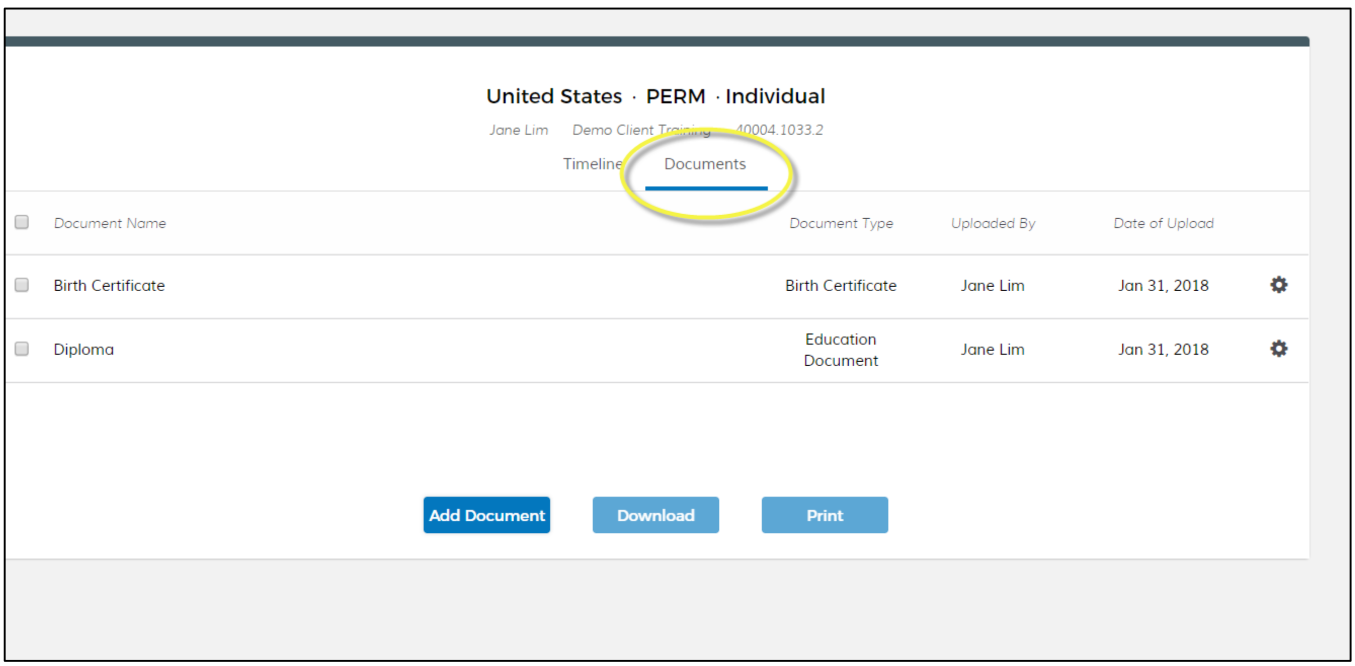


➢ Click upload documents to upload to the specific case



- You can also click on the cases link so that all case types associated with user will display.
- Any of the information listed on the case screen works as a hyperlink to that project. By clicking on it, the user will view details about the chosen project.
- Click on the case type to upload documents to that case.

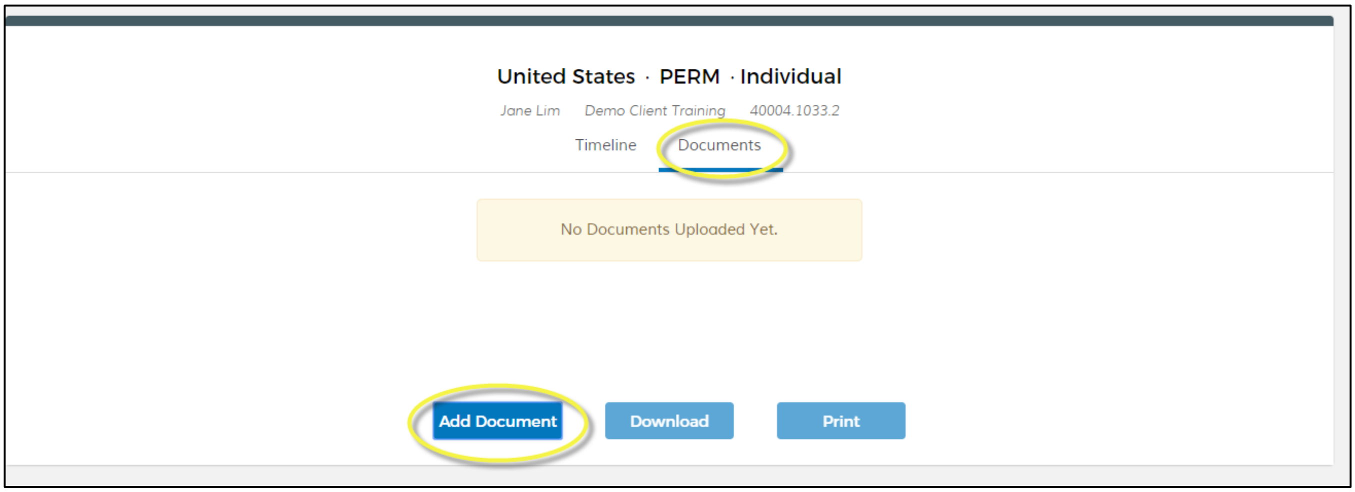




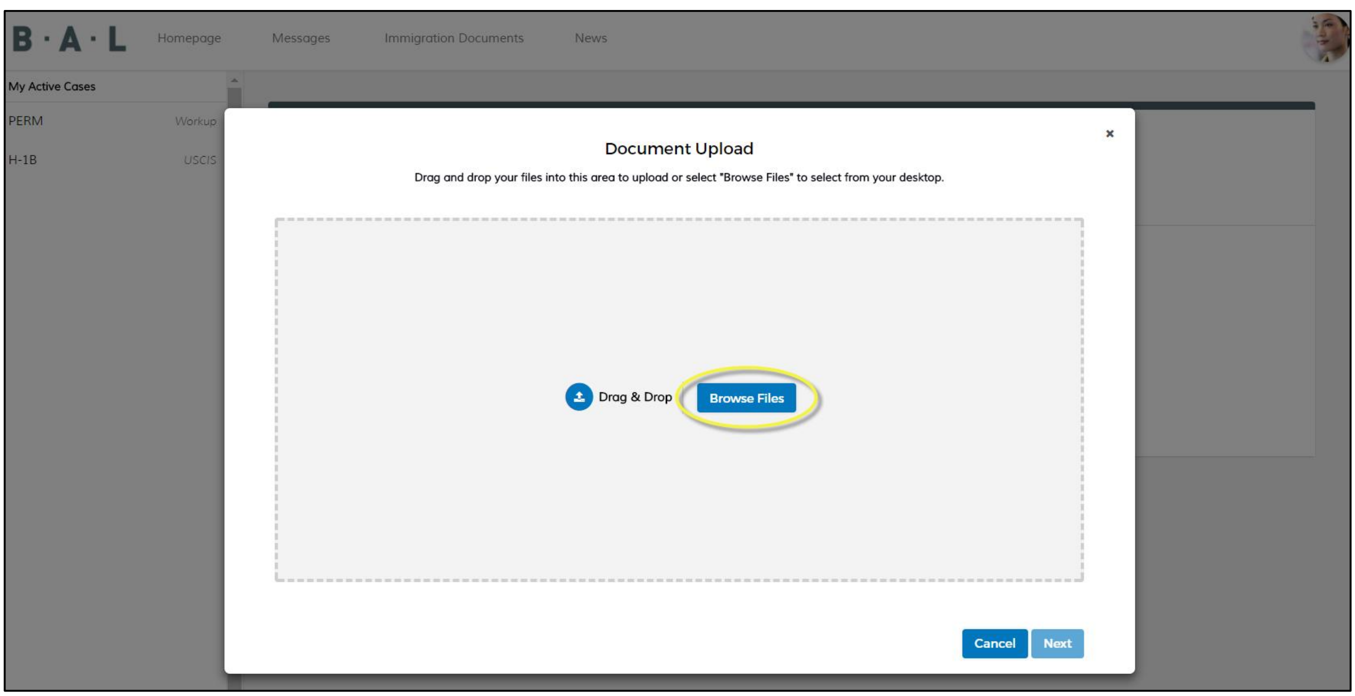
- By ticking checkbox on the left of the name of the document, users can download and access or print document.

- Documents can be downloaded or printed in bulk or individually. If the print function is selected, a separate tab will open, where documents will appear in Pdf format ready to print.

- Supported file types for printing options are: Word, pdf, jpeg, png. This restriction does not apply when you are just downloading files.
- You can also edit or delete documents that were uploaded by you to the system. To do that, click on the little settings icon to the right of the document next to “date of upload.”
- To add a document:
    - ✓ Click the Add Document button and a pop-up screen will appear.



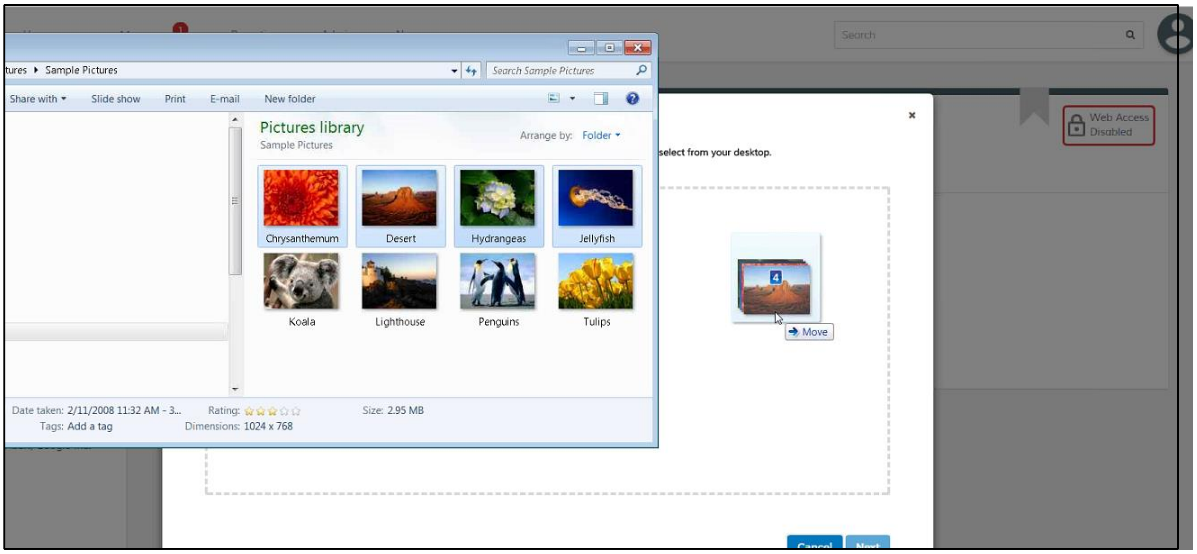
    - ✓ Select Browse Files to upload documents from your computer



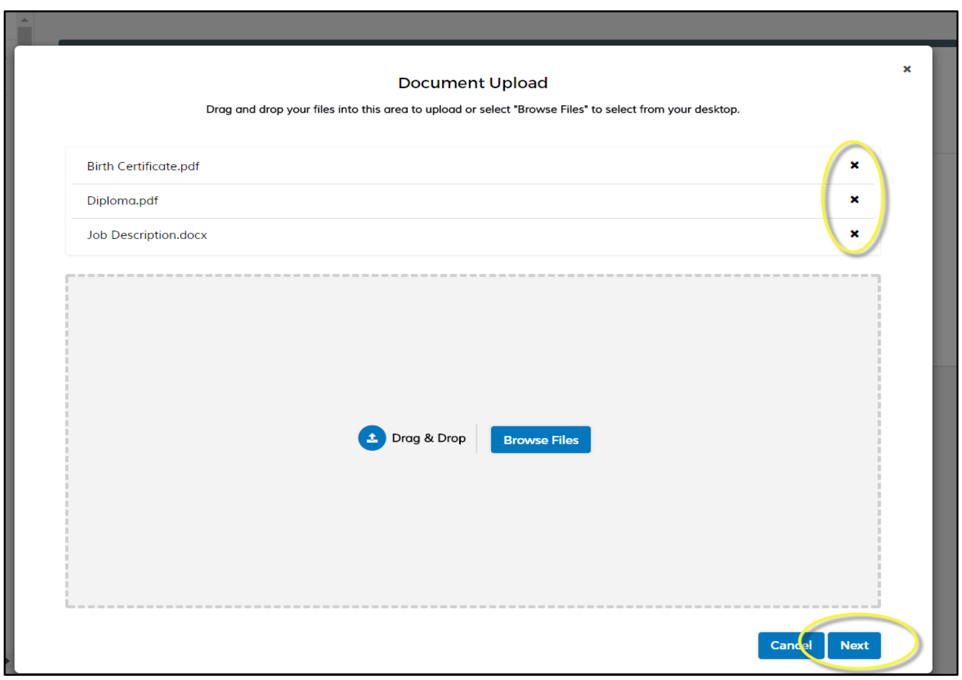
Drag and Drop:

On the upload screen you have the ability to drag and drop documents into the case level documents tab for upload.

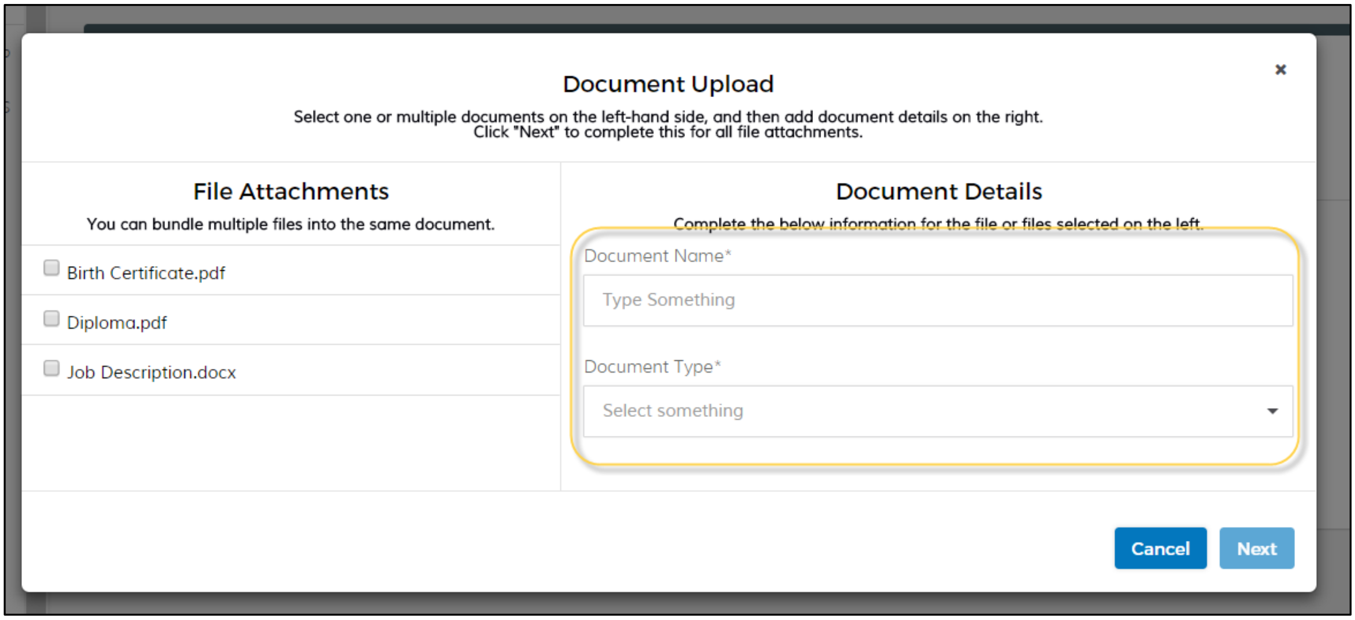
- ✓ Simply select the files with your mouse and drag them to the upload area



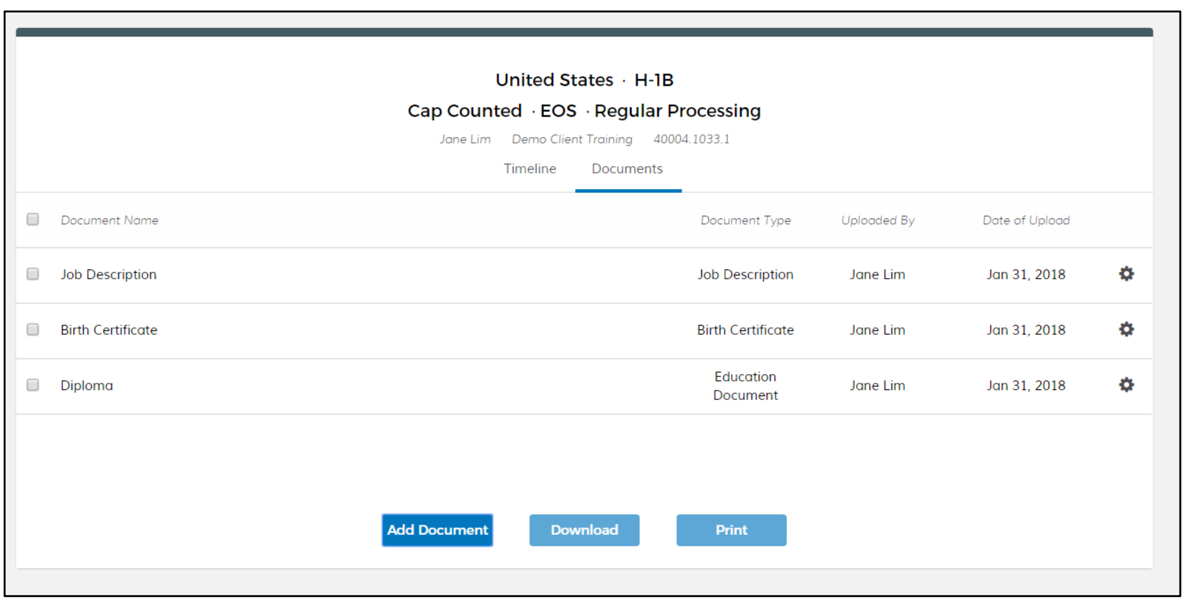
- ✓ After the files are uploaded, you have the option to remove them by clicking the x
- ✓ Click Next to continue



- ✓ Enter a document name and choose a document type
- ✓ Choose the document visibility
- ✓ If multiple files are selected, you have the ability to bundle them on the left-hand side and create details for them on the right-hand side. You can upload each attachment as its own file, or bundle them all together.

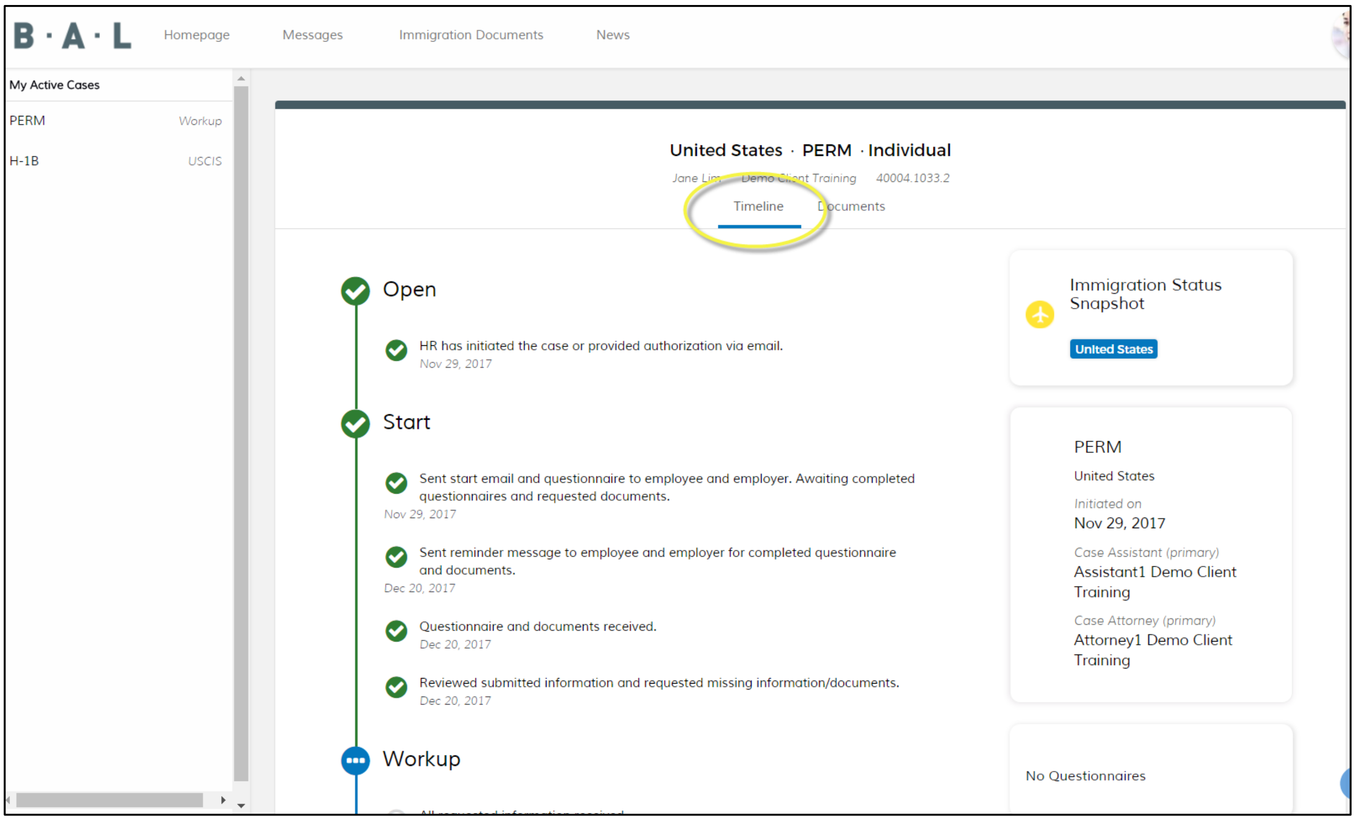


- ✓ Continue clicking Next until the details for all documents are entered



4. Timeline

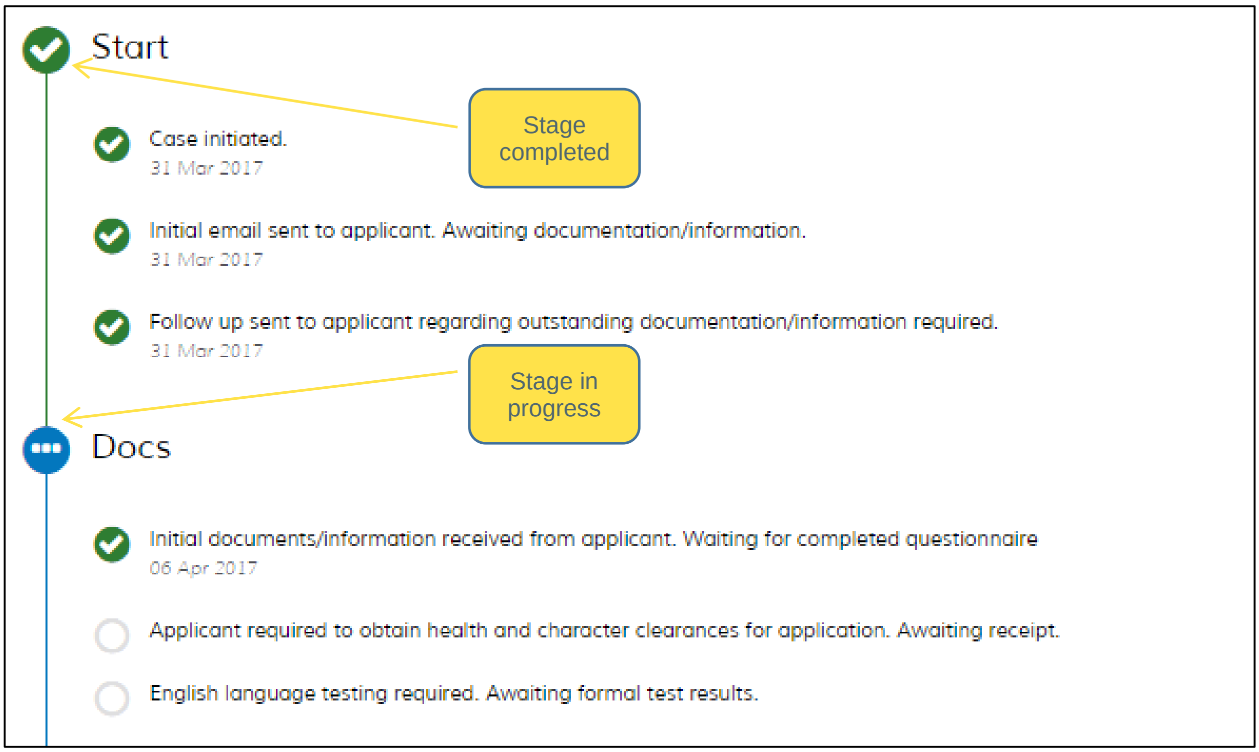
While in the case type window, user can view the timeline of the specific project. By accessing the Timeline tab at the case level, the user can easily understand the case timeline and what stage the case is at. This is a useful feature that allows the user to visually review milestones for each case, quickly spot what steps of the process have been completed to date, and what is the next step of the process.



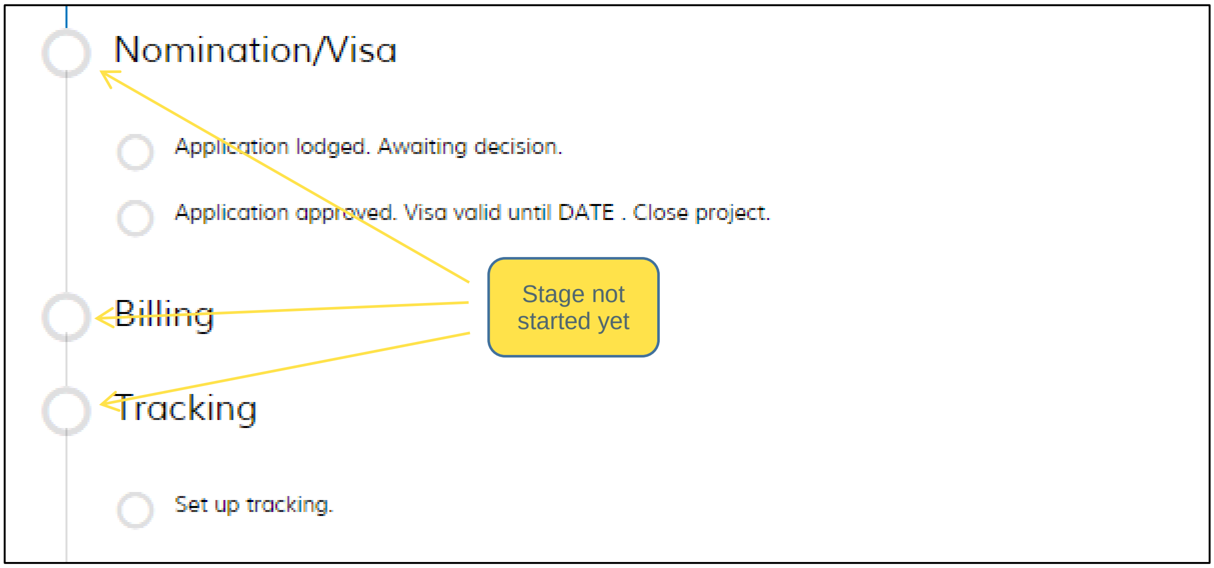
- On the left hand side, you will see a list of all of the case stages available (e.g. Start, Docs, Government, Tracking, Close, etc.).
- Visible on the right hand side is high level case information such as the case type, destination country, date of the case initiation and details of the primary BAL attorney and BAL assistant.
- You will also be able to see and access any questionnaires assigned to this case.

Timeline Review

- Any completed stages will show with a green check mark. Any stage that is open and in progress will have the blue icon.



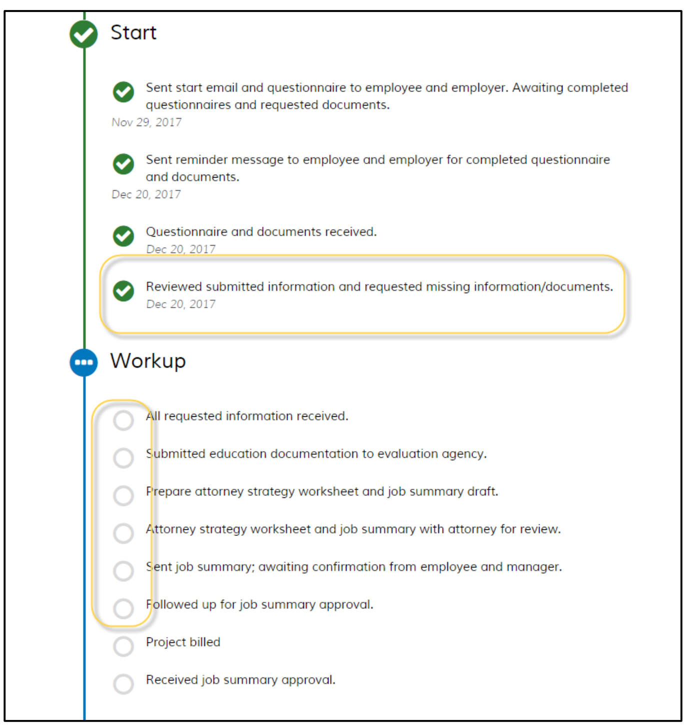
- Any stages not started will show as a gray open circle.



Timeline Notes:

BAL Legal Team members are able to post detailed notes within each stage of the case.

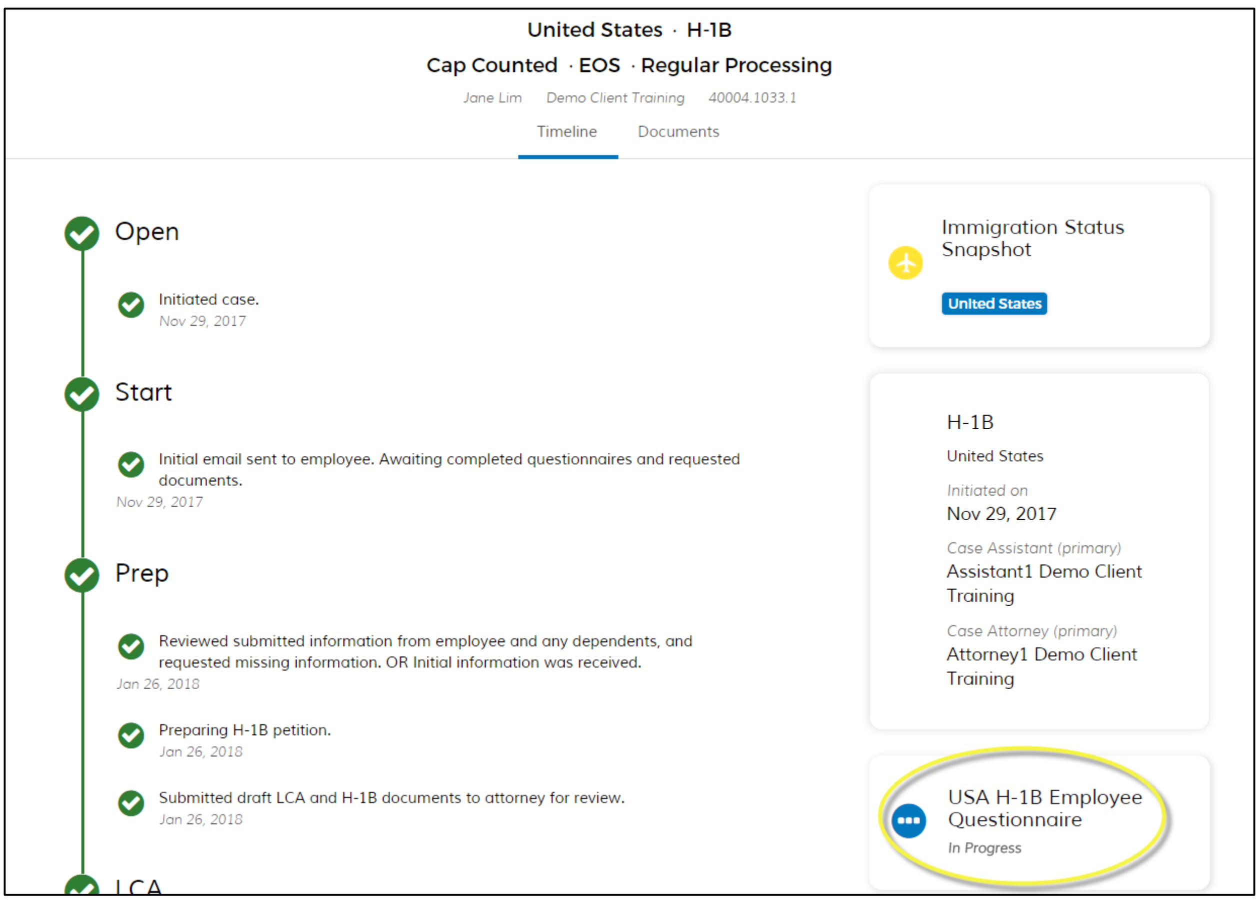
- Timeline notes posted by BAL team members will have a date indicating the posting date.
- Timeline notes for upcoming steps of the process will display with a gray circle and no date.
- The notes are visible to company contacts as well as the beneficiary.



4. Questionnaire

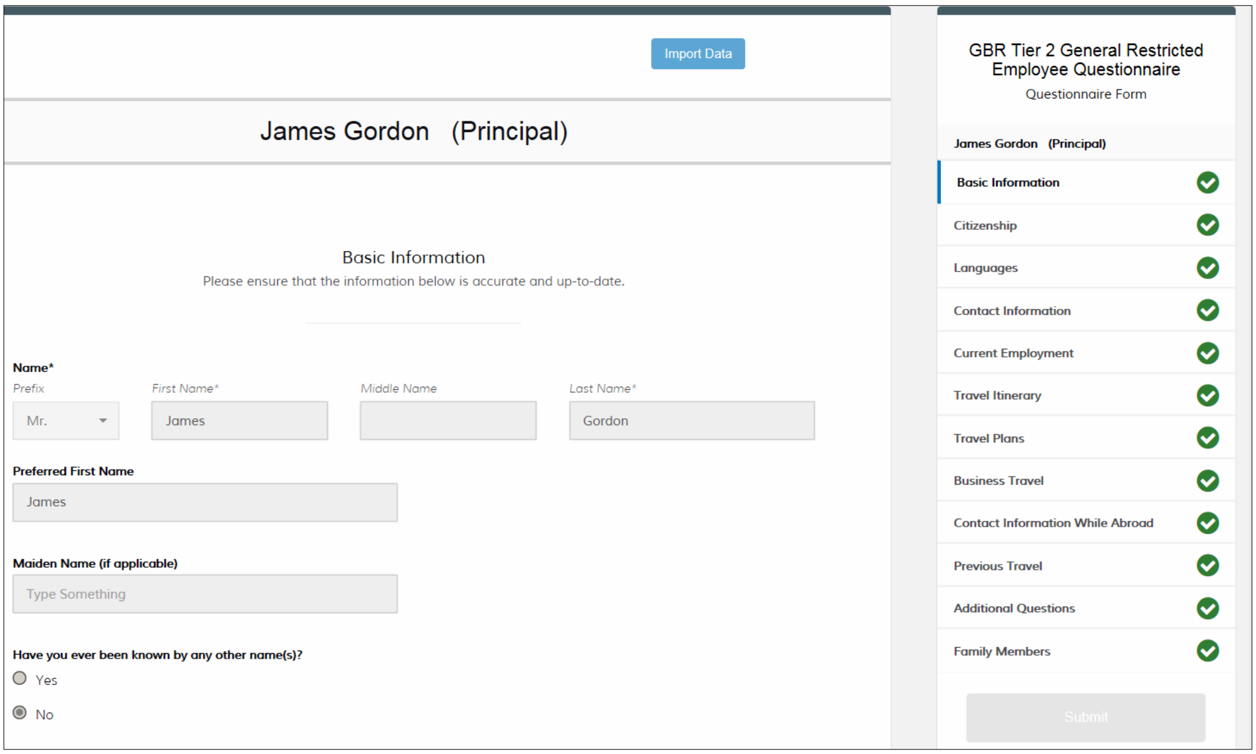
When a Questionnaire is assigned to a user, the Questionnaire will appear on the right hand side under the high level case information.

- If the questionnaire is not completed, it will display a gray circle next to it.
- If the questionnaire is in progress, it will display a blue circle with three dots next to it.
- If the questionnaire is completed, it will display a green circle with a check mark and a date indicating when the questionnaire was completed.
- The user will be able to edit the questionnaire by clicking on the questionnaire title.



- Once in the questionnaire, the user will see all of the information that needs to be completed on the right hand side of the screen. Once an information stage is completed, the stage will show a green check mark to the right of the stage.

- The user will be able to navigate the questionnaire by clicking on the stages to the right of the questionnaire or by scrolling down through the principal's page.



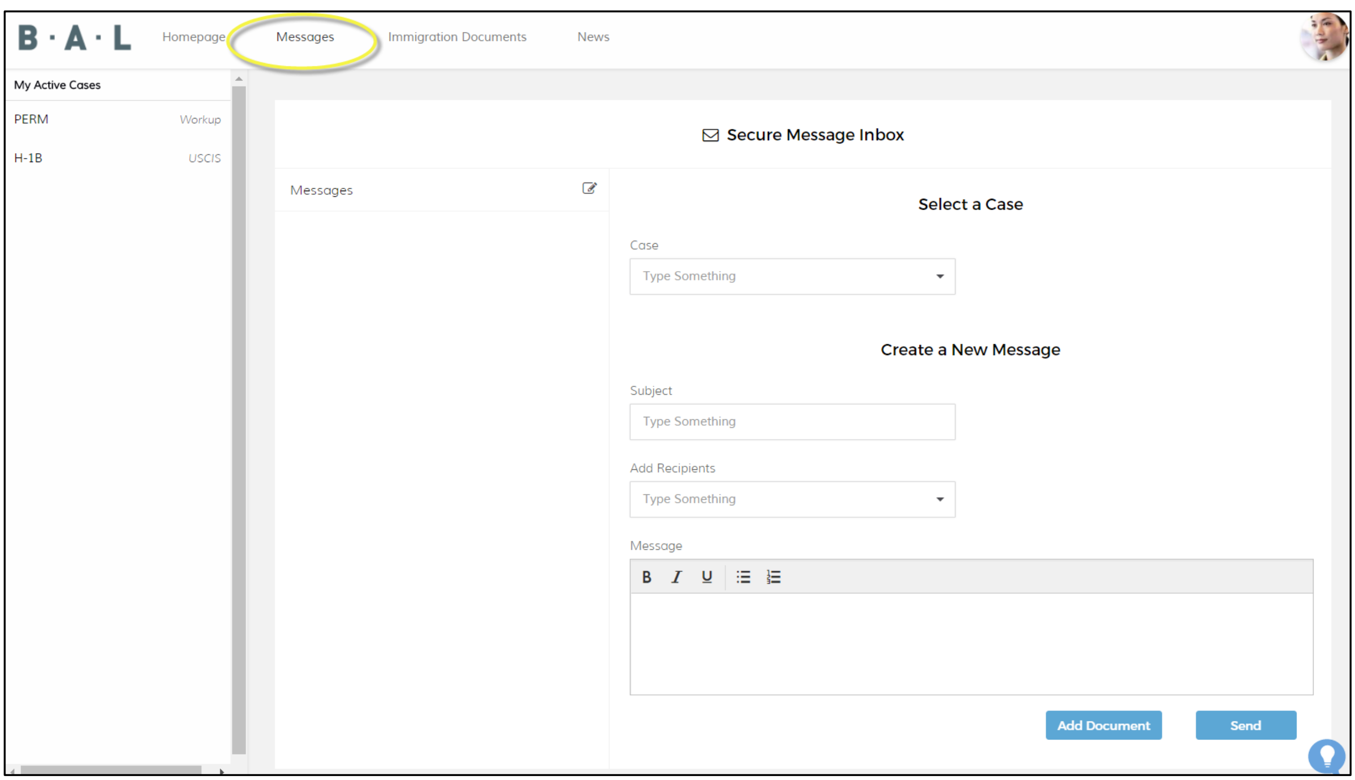
5. Secure Message

Using Secure Message system within Cobalt is a great way to communicate securely while maintaining a record of case history. The Secure Messaging also allows users to reply directly to parties' messages within the system.

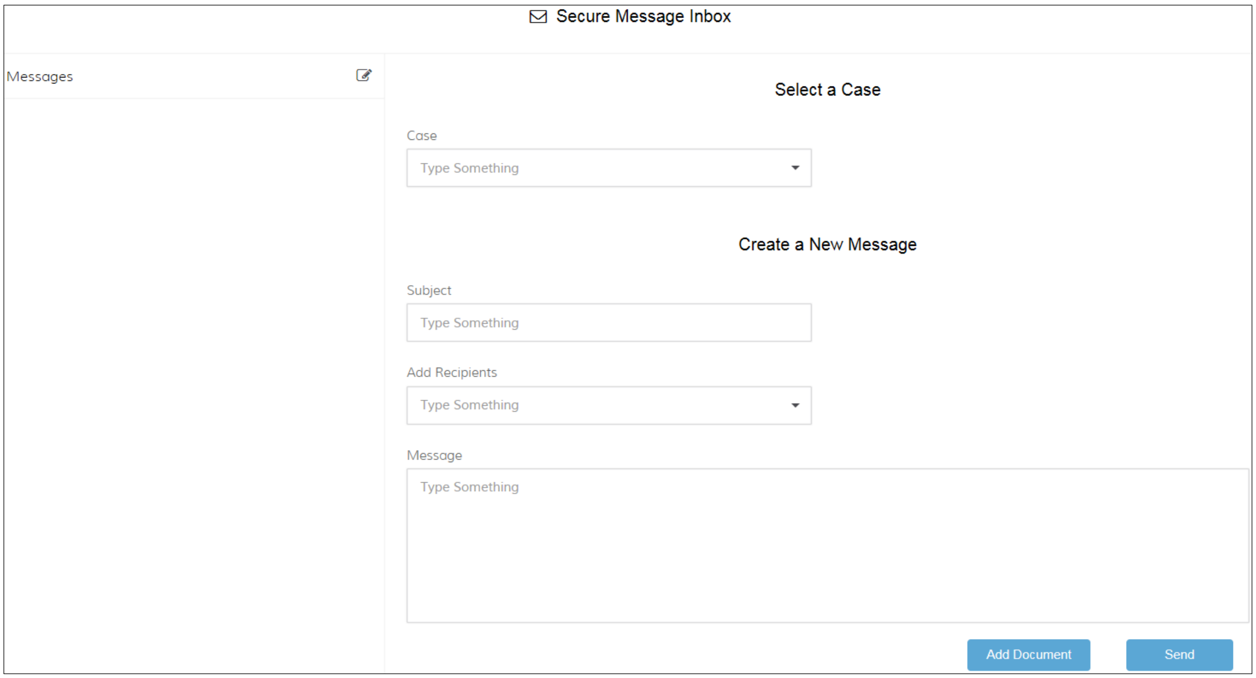
- Secure Messages can be accessed from the homepage menu options
- On the left hand side corner of the secure message inbox window, users will be able to view any messages the user was the recipient of.
- Users will receive an email notification each time a new secure message is sent to them.

Compose Secure Message

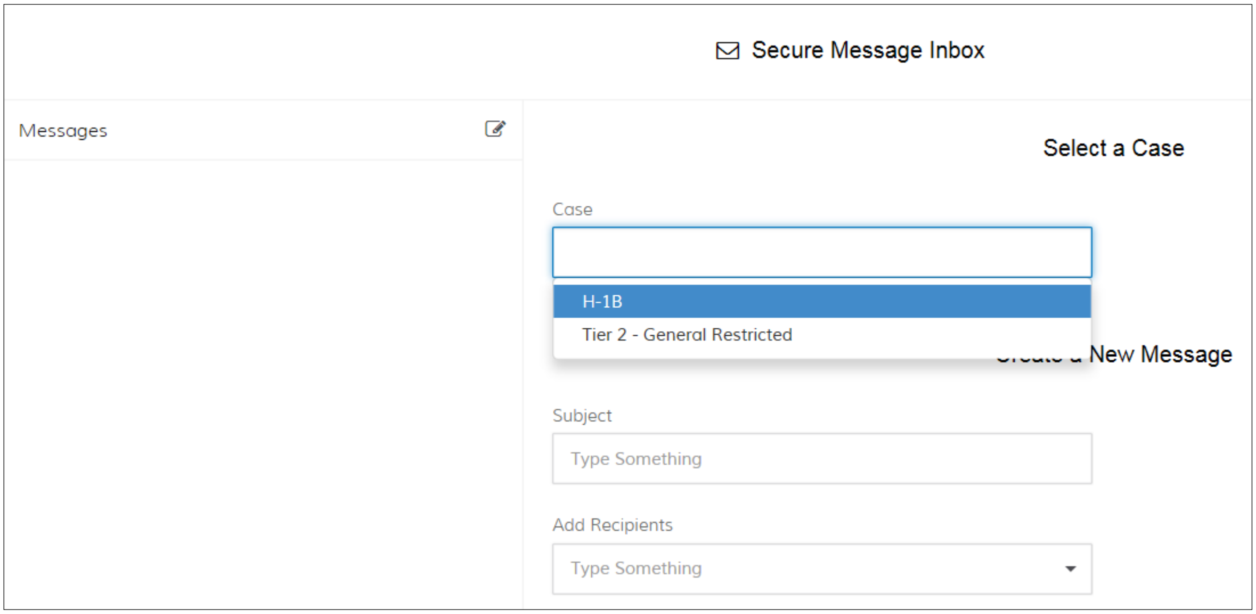
- Navigate to Messages link.



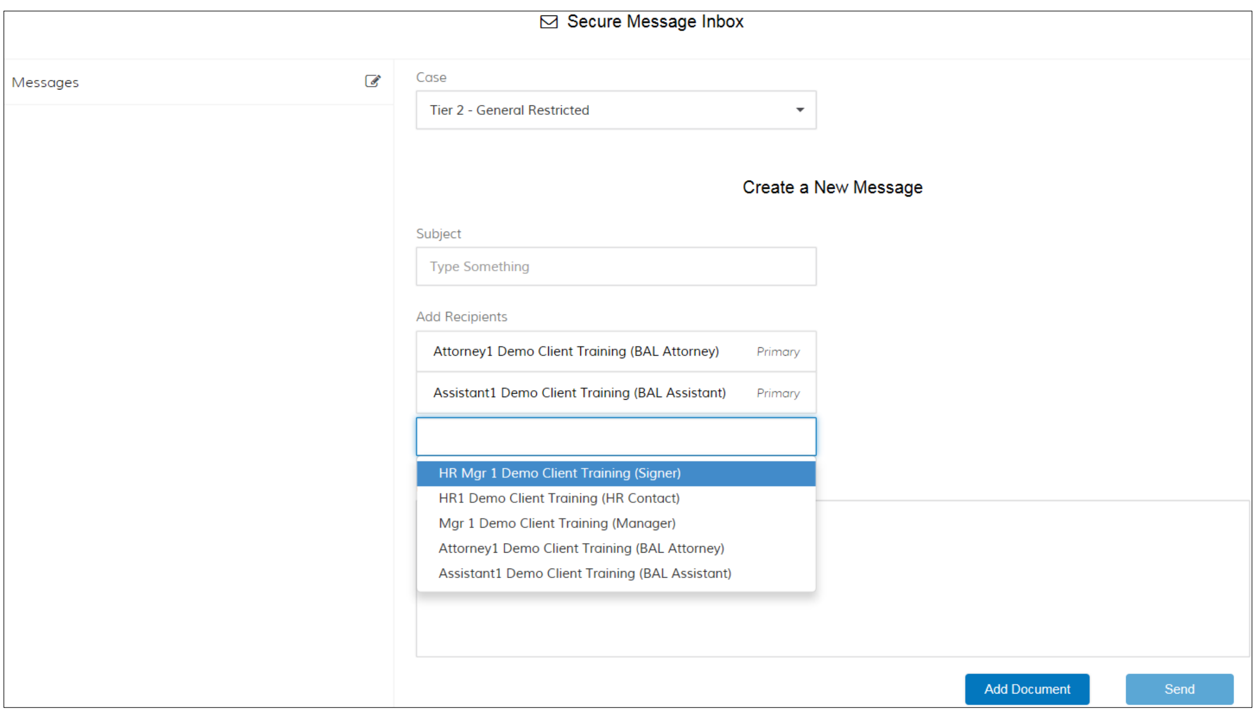
- Secure Message Inbox will appear.



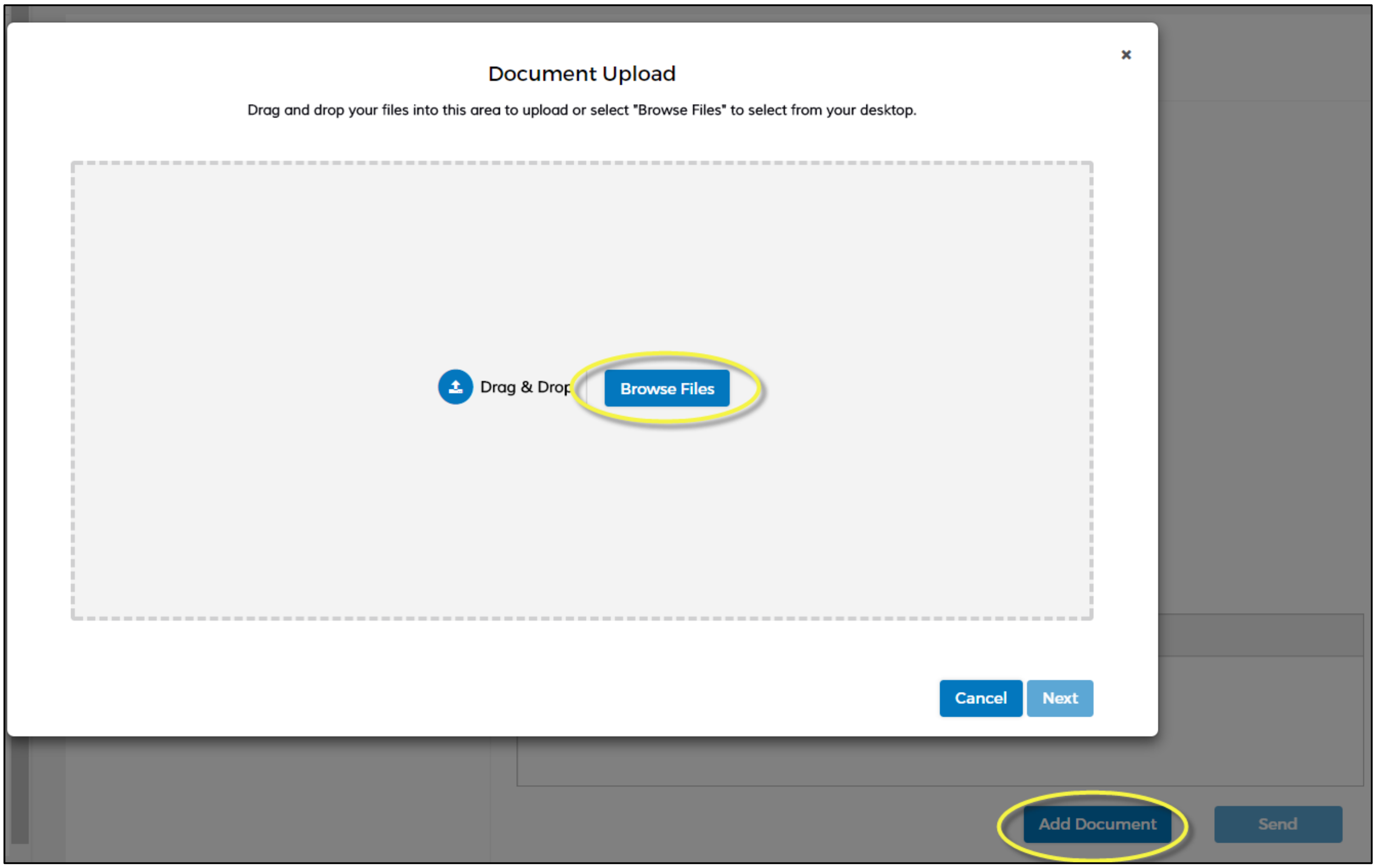
- To compose a new message, the user must select the case the message pertains to. The user can make the selections by using drop down menu available in the “case” window.



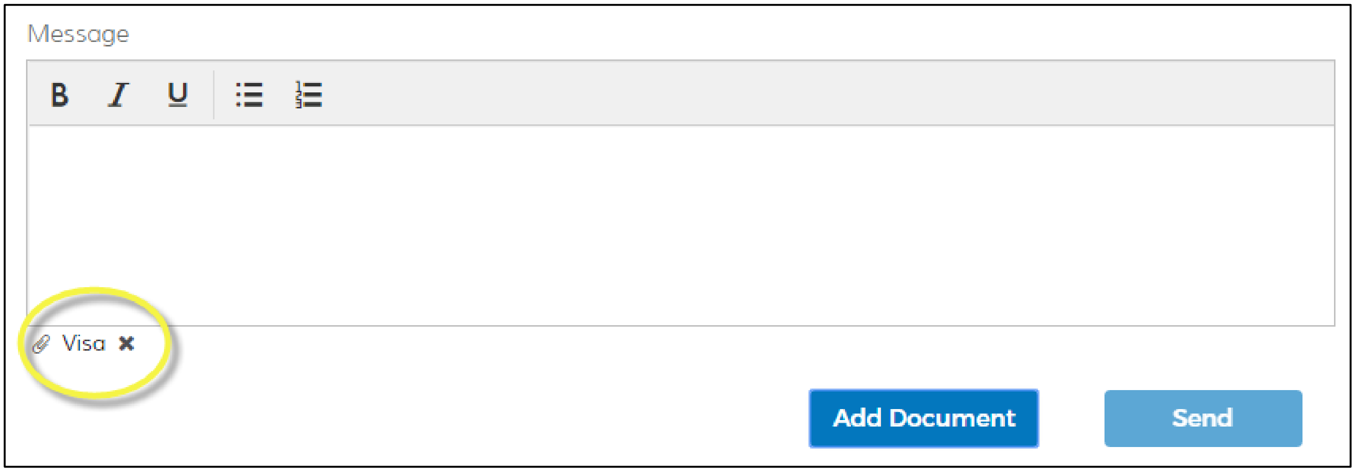
- After selecting the case type, the "Add Recipients" windows will automatically include the BAL primary Attorney and Assistant as recipients.
- If the user wishes to add another recipient, the user must use the drop down menu. Note that only contacts linked to the case can be recipients to the message (e.g. beneficiary or manager- if she/he is a case contact).



- ➢ Complete Subject of the message (free text).
- ➢ Include a note in the Message box (free-text with no character limit).
- ➢ Click Add Document to select documents as attachments to the message.
  - ✓ In the Open pop up dialog, type the name of the document (free text)
  - ✓ Select the document type from the drop down menu.
  - ✓ Note that both of those fields are mandatory and marked with an asterisk.
- ➢ When finished, click Upload button.



- Successfully uploaded documents will show up under the message box.



- Clicking the x will remove the document
- You can upload and send multiple documents with the secure message.
- When finished composing the message, click Send.

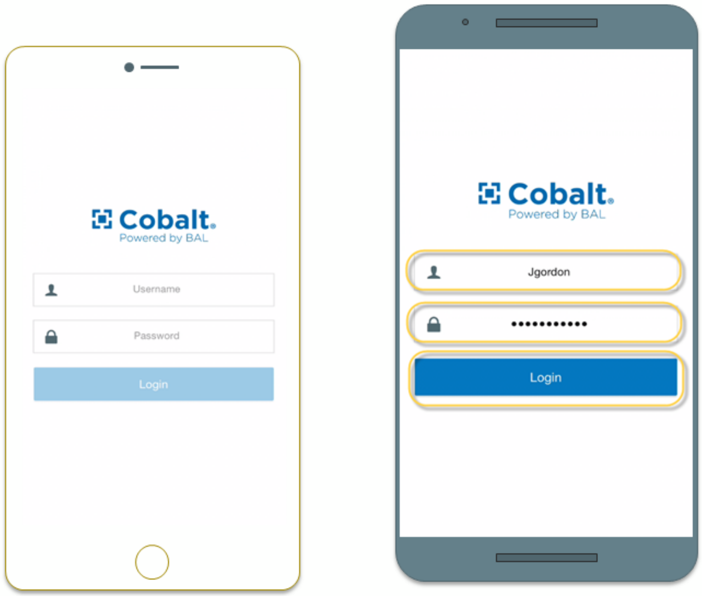
6. Mobile Application

To access the mobile app, the user must download the BAL Cobalt app.

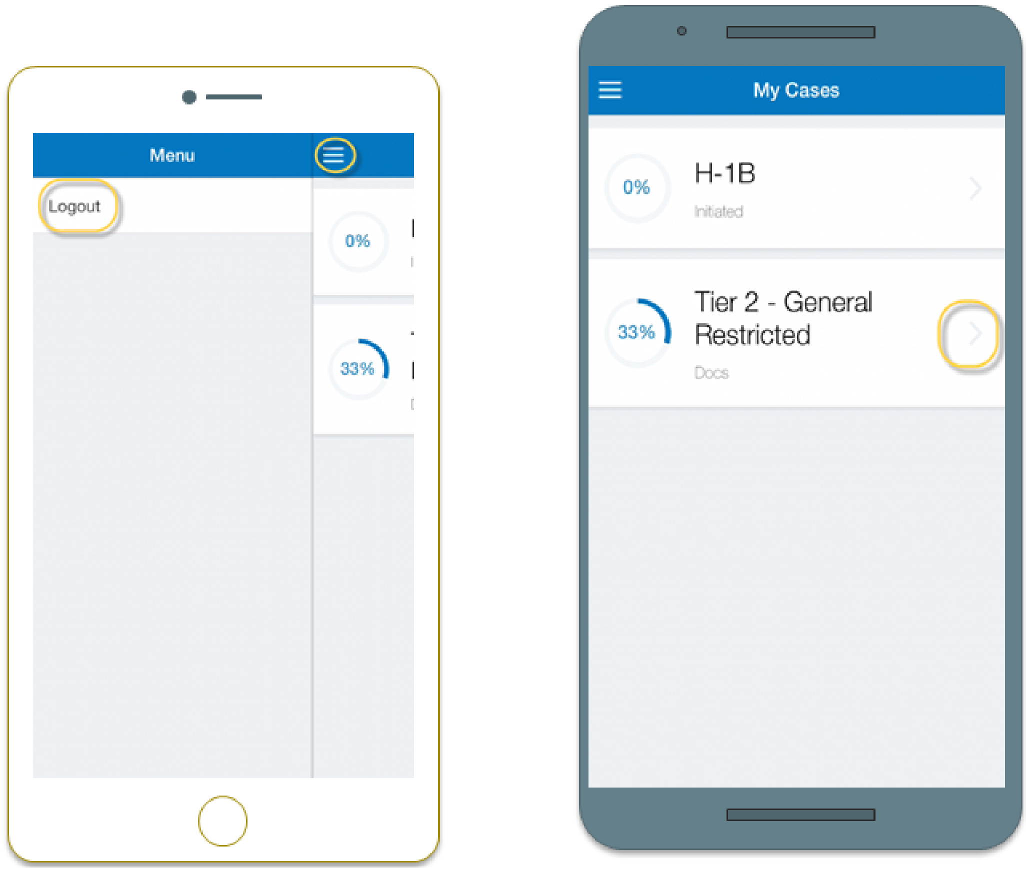
Download on the App Store

GET IT ON Google Play

Proceed to login by opening the app and typing in the username and password.



➢ The app will open to “My Cases” page, which will list all open projects for the user and the percentage progress for each project and the state each project is at.



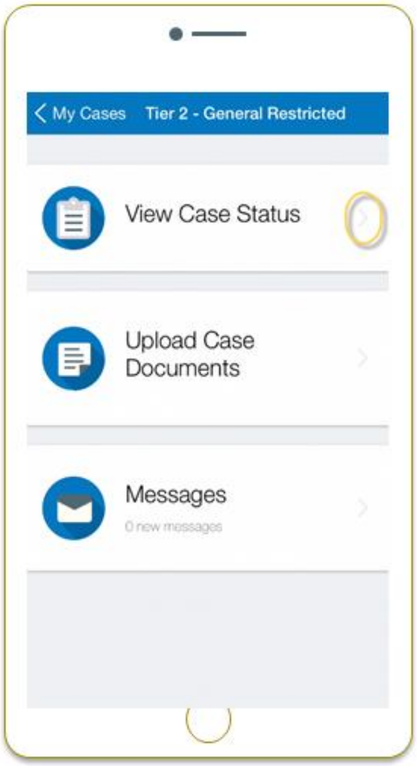
➢ Clicking on each project will direct the user to the details of that project by allowing the user to view:

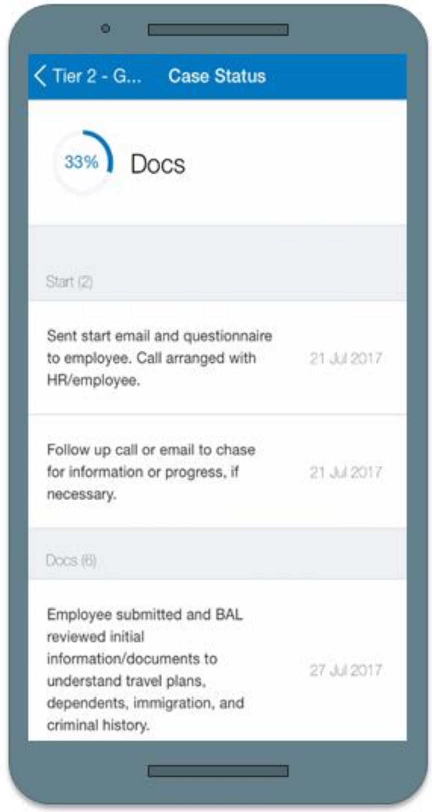
  ✓ Case Status

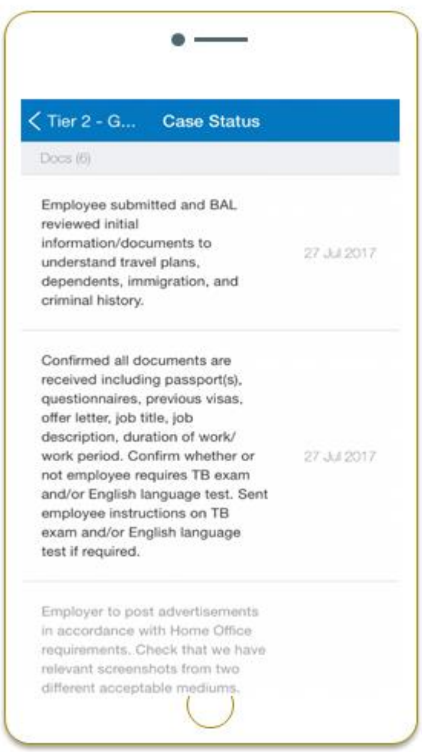
  ✓ Upload Case Documents

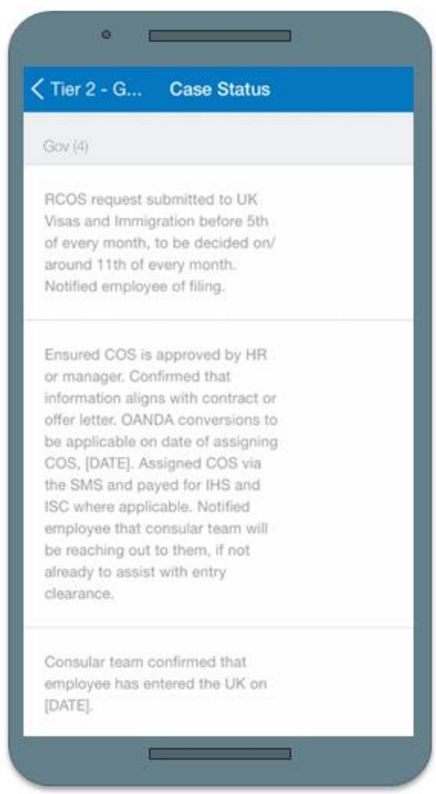
  ✓ View and Create Messages

➢ View case status allows the user to access the project's timeline.

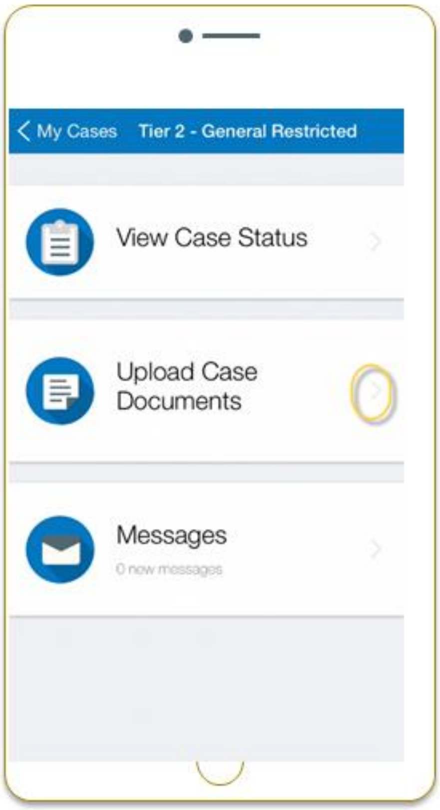

My Cases
Tier 2 - General Restricted
View Case Status
Upload Case Documents
Messages
0 new messages

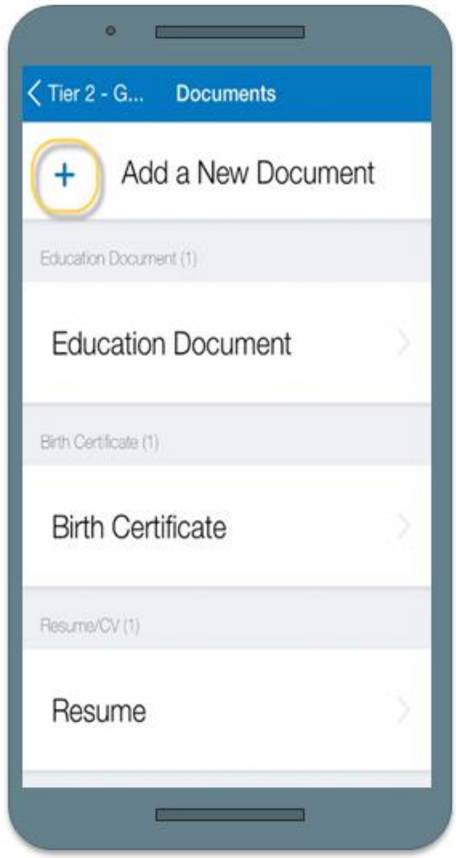

Tier 2 - G...
Case Status
33%
Docs
Start (2)
Sent start email and questionnaire to employee. Call arranged with HR/employee.
21 Jul 2017
Follow up call or email to chase for information or progress, if necessary.
21 Jul 2017
Docs (6)
Employee submitted and BAL reviewed initial information/documents to understand travel plans, dependents, immigration, and criminal history.
27 Jul 2017


Tier 2 - G...
Case Status
Docs (6)
Employee submitted and BAL reviewed initial information/documents to understand travel plans, dependents, immigration, and criminal history.
27 Jul 2017
Confirmed all documents are received including passport(s), questionnaires, previous visas, offer letter, job title, job description, duration of work/ work period. Confirm whether or not employee requires TB exam and/or English language test. Sent employee instructions on TB exam and/or English language test if required.
27 Jul 2017
Employer to post advertisements in accordance with Home Office requirements. Check that we have relevant screenshots from two different acceptable mediums.


Tier 2 - G...
Case Status
Gov (4)
RCOS request submitted to UK Visas and Immigration before 5th of every month, to be decided on/ around 11th of every month. Notified employee of filing.
Ensured COS is approved by HR or manager. Confirmed that information aligns with contract or offer letter. OANDA conversions to be applicable on date of assigning COS, [DATE]. Assigned COS via the SMS and payed for IHS and ISC where applicable. Notified employee that consular team will be reaching out to them, if not already to assist with entry clearance.
Consular team confirmed that employee has entered the UK on [DATE].

➢ Upload Case Documents allows the user to edit and upload documents associated with that case





➢ To add documents, click on the + sign.

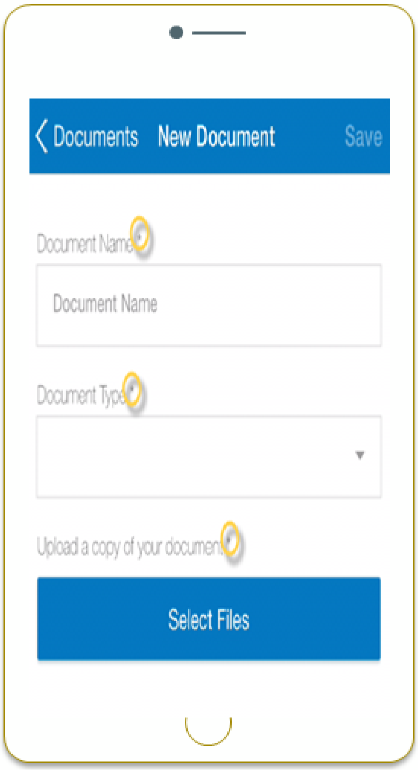
➢ Enter the document name to be uploaded (free text).

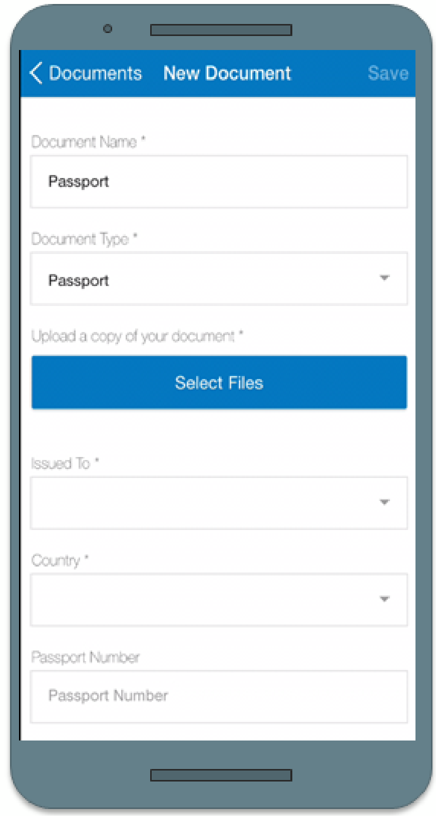
➢ Select the document type (drop down menu).

➢ Click Select Files

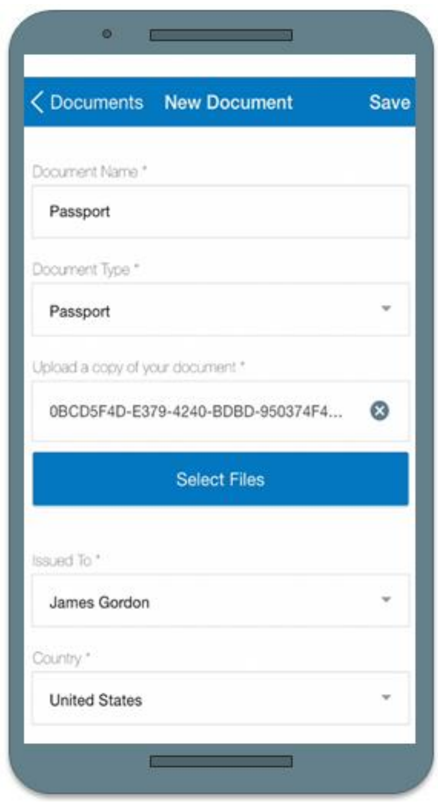
  ✓ The app gives the user the option to take a picture or to select from phone picture gallery

  ✓ Click save

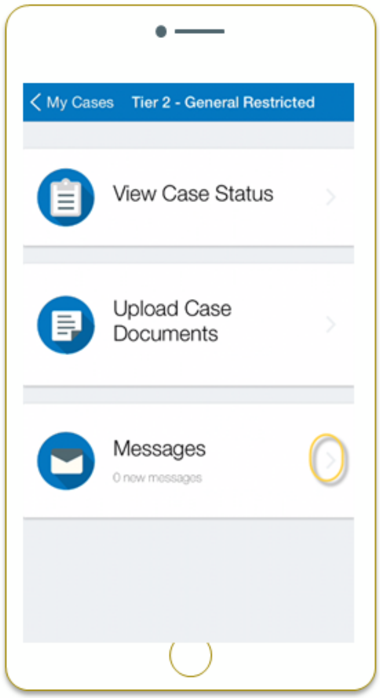

Documents
New Document
Save
Document Name
Document Name
Document Type
Upload a copy of your document
Select Files

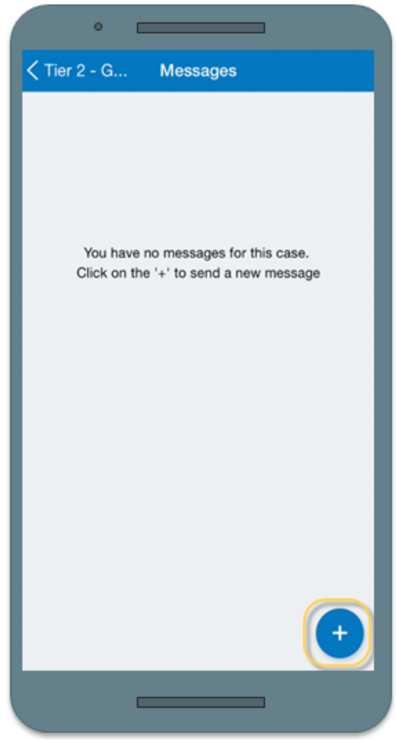

Documents
New Document
Save
Document Name *
Passport
Document Type *
Passport
Upload a copy of your document *
Select Files
Issued To *
Country *
Passport Number
Passport Number


Cancel
Light

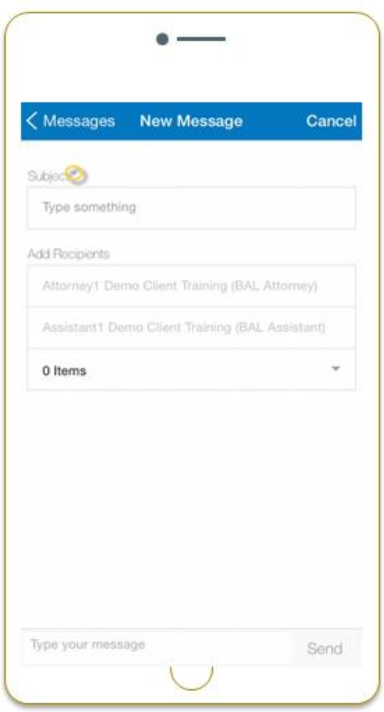

Documents
New Document
Save
Document Name *
Passport
Document Type *
Passport
Upload a copy of your document *
0BCD5F4D-E379-4240-BDBD-950374F4...
Select Files
Issued To *
James Gordon
Country *
United States

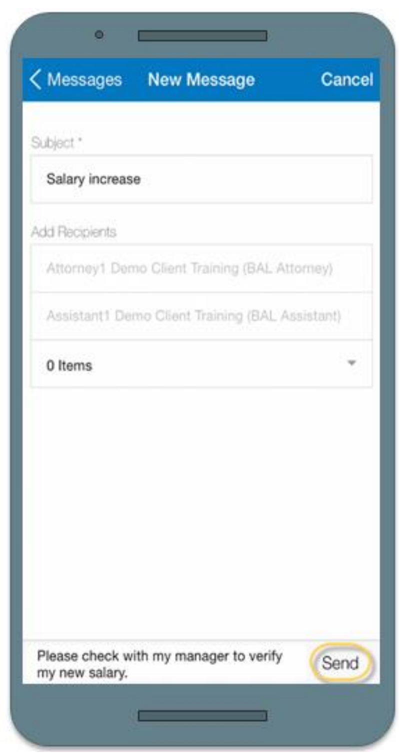
- The Message option allows the user to view and create a message in connection with that case.





- Select the + sign to create a new message.





- Complete Subject of the message (free text).
- The “Add Recipients” windows will automatically include the BAL primary Attorney and Assistant as recipients.
- If the user wishes to add another recipient, the user must use the drop down menu. Note that only contacts linked to the case can be recipients to the message (e.g. beneficiary or manager- if she/he is a case contact).
- Include a note in the Message box (free-text with no character limit).
- When finished, click Upload button.