

**B · A · L**

## Employee Guide

Cobalt Guide

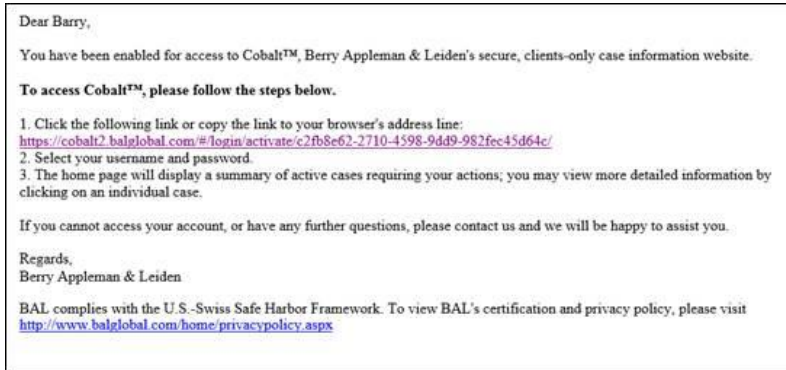
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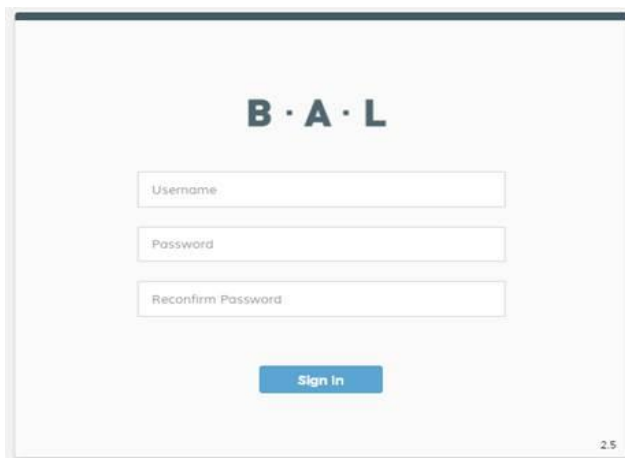
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# 1. Creating Username and Password

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



Click on the link and be directed to Cobalt V2.

A web form for user registration. It features the BAL logo at the top, followed by three input fields for 'Username', 'Password', and 'Reconfirm Password'. A blue 'Sign In' button is located below the fields. The page number '25' is visible in the bottom right corner.

Create a username and password.

Please make sure the password contains:

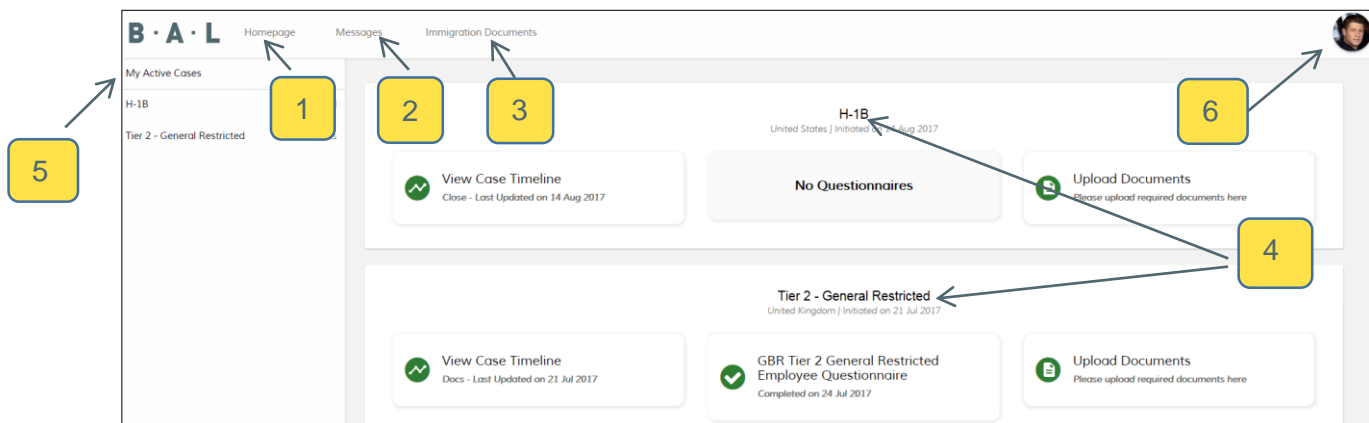
- Minimum of eight characters
- At least 3 of the following 4 character classes
- at least one lower case letter
- at least one upper case letter
- at least one number
- at least one symbol

## 2. User Profile

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



## Cobalt Homepage

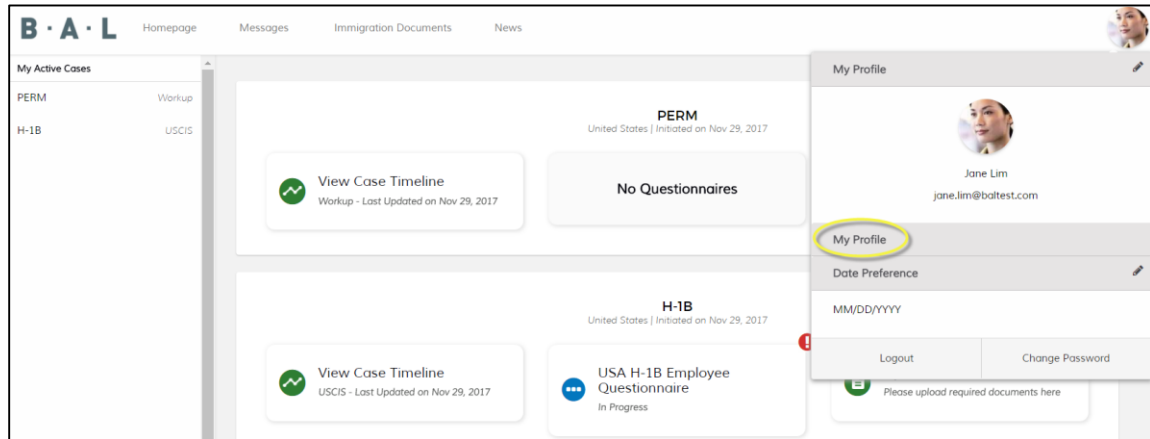


### Homepage Section:

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.

A screenshot of the B·A·L web application showing the 'My Profile' page for a user named James Gordon. The page is titled 'James Gordon' with 'Demo Client Training' and '40004.1027' below it. The navigation tabs are 'Profile', 'Immigration Documents', and 'Cases'. The 'Profile' tab is active. The 'Basic Information' section includes fields for Prefix (Mr.), First Name (James), Middle Name (Type Something), Last Name (Gordon), Preferred Name (James), Maiden/Other Name (Type Something), Gender (Male), Relationship Status (Single), Date of Birth (10 August 1984), Country of Birth (Turkey), State/Province of Birth (Type Something), City of Birth (Istanbul), and Citizenship (Turkey). The 'Family Members' section shows a list with 'James Gordon' as the Principal, with details for Citizenship (Turkey), Date of Birth (10 Aug 1984), and Age (33 years old). A blue plus icon is visible next to the family members list.

➤ 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.

**B · A · L** Homepage Messages Immigration Documents

My Active Cases

H-1B Initiated

Tier 2 - General Restricted Docs

### Employment Information

Company: Demo Client Training

Employing Entity: Select

Occupation: Engineer

Job Title: Software Engineer III

Job Code: TS

Job Level/Grade: Type Something

Job Description: Type Something

Base Salary: 135000 USD

Per: Year

Payroll Location: Host country payroll

Original Hired Date: Select Date

Re-Hired Date: Select Date

Termination Date: Select Date

EmployeeID: 256578

Business Unit: Select

Work Location: Type Something

Address: 1 Wacker Street

Address Line2:

Chicago Illinois

United States 60611

Work Location Start Date: Start Date

Work Location End Date: End Date

<https://ms-dmo.balglobal.com/#/dashboard/messages>

#### ➤ 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.

**Jane Lim**  
Demo Client Training 40004.1033

Profile Immigration Documents Cases Documents

---

### Basic Information

Prefix: Ms.  First Name: Jane Middle Name: Happy Last Name: Lim

Preferred Name: Jane Maiden/Other Name: Type Something

Gender: Female Relationship Status: Married

Date of Birth: May 17, 1985

Country of Birth: Singapore State/Province of Birth: Type Something City of Birth: Type Something

Citizenship: Singapore, United Kingdom

### Immigration Status Snapshot

**United States**

### Family Members

**Jane Lim** Principal

Citizenship: Singapore, United Kingdom

Date of Birth: May 17, 1985 (32 years old)

**James Lim** Spouse

Citizenship: Singapore

Date of Birth: May 27, 1982 (35 years old)

➤ 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.

**B·A·L** Homepage Messages Immigration Documents

My Active Cases

H-1B Initiated

Tier 2 - General Restricted Docs

### Contact Information

Phone Number: Type Country Primary Number Ext Primary

Email Address: Type Something Primary

Type of Address: Select

Address: Address Line1 Address Line2 City State/Province Country Zip/Postal Code

Add Another

### Family Members

**Jane Lim** Principal

Citizenship: Singapore, United Kingdom

Date of Birth: May 17, 1985 (32 years old)

**James Lim** Spouse

Citizenship: Singapore

Date of Birth: May 27, 1982 (35 years old)

+



### 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

**B·A·L** Homepage Messages **Immigration Documents** News

**My Active Cases**

PERM	Workup
H-1B	USCIS

**Jane Lim**  
Demo Client Training 40004.1033

Profile **Immigration Documents** Cases Documents

☒ Active Only

**Immigration Status Snapshot**  
[United States](#)

**Jane Lim (Principal)**  
Date of Birth May 17, 1985  
Country of Birth Singapore

**China**

Classification	Document	Expiration
✓ Work Permit and Residence Permit	Work Permit/Work Authorization	Jun 1, 2018

**United States**

Current Status	Previous Status	Future Status
L-2 Dependent of L-1 Intr...	Select	Select

**First Entry Date**  
MM/DD/YYYY

**A Number**  
Type Something

Classification	Document	Expiration
✓ L-2 Dependent of L-1 Intracompany Transferee	I-94 Arrival/Departure Record	Apr 1, 2018

**US Immigrant Visa Priority Date(s)**

This section is to track priority date(s) associated with US Immigrant Visas. If you are not applying for an Immigrant Visa for the United States, you may ignore this section

### 3. Uploading Documents

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

The screenshot shows the user interface for Jane Lim's case. At the top, the name 'Jane Lim' is displayed with 'Demo Client Training' and '40004.1033' below it. A navigation bar includes 'Profile', 'Immigration Documents', 'Case', and 'Documents', with 'Documents' circled in yellow. Below the navigation bar, there's a section for 'Jane Lim (Principal)' with birth details. To the right, an 'Immigration Status Snapshot' shows 'United States'. The main area is divided into 'China' and 'United States' sections. The 'China' section shows a 'Work Permit and Residence Permit' with an expiration date of 'Jun 1, 2018'. The 'United States' section shows 'Current Status' as 'L-2 Dependent of L-1 Intr...', 'Previous Status' as 'Select', and 'Future Status' as 'Select'. It also includes a 'First Entry Date' field and an 'A Number' field. Below this, another document entry is shown for 'L-2 Dependent of L-1 Intracompany Transferee' with an expiration date of 'Apr 1, 2018'. A sidebar on the right explains the 'US Immigrant Visa Priority Date(s)' section.

- Click upload documents to upload to the specific case

The screenshot shows the A.L. case management dashboard. The top navigation bar includes 'Homepage', 'Messages', 'Immigration Documents', and 'News'. On the left, there's a sidebar with 'Active Cases' and a list of cases including 'RM', 'IB', 'Workup', and 'USCIS'. The main area displays two case cards: 'PERM' and 'H-1B'. Each card has a 'View Case Timeline' button, a 'No Questionnaires' button, and an 'Upload Documents' button. The 'Upload Documents' buttons are circled in yellow. The 'PERM' card also shows 'United States | Initiated on Nov 29, 2017'. The 'H-1B' card shows 'United States | Initiated on Nov 29, 2017' and a 'USA H-1B Employee Questionnaire' button with 'In Progress' status.

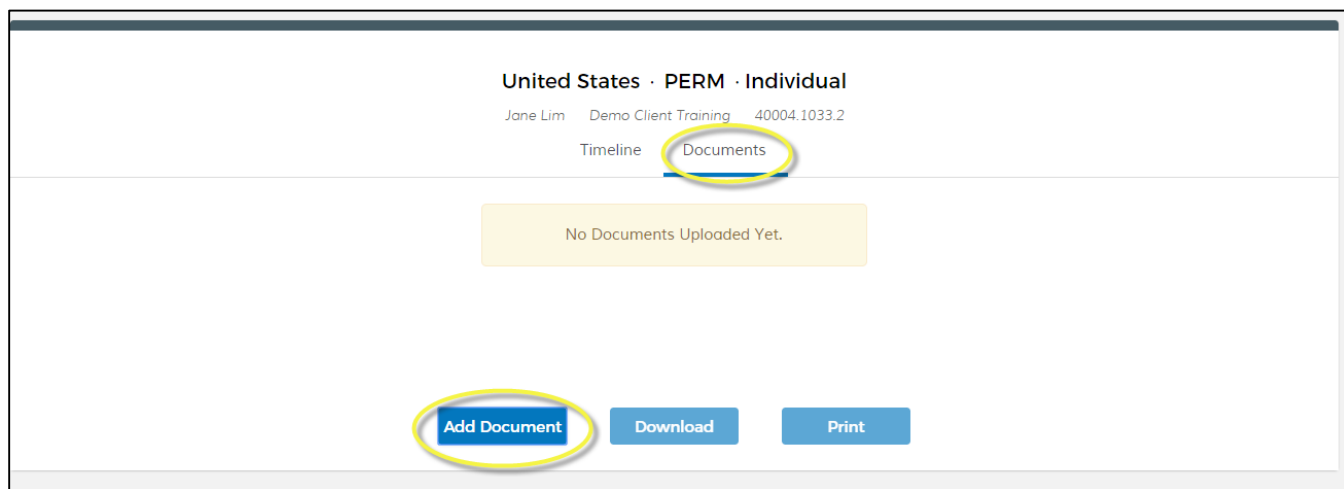
- You can also click on the cases link so that all case types associated with user will display.
- Any of the information listed on the case screen works as a hyperlink to that project. By clicking on it, the user will view details about the chosen project.
- Click on the case type to upload documents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

<div> <div>Hyperlinks</div> <div> James Gordon  Demo Client Training 40004.1027 </div> <div> Profile Immigration Documents <b>Cases</b> Documents </div> </div>						
Destination Country	Case Type	Opened Date	Closed Date	Attorney	Assistant	
Taiwan, Roc	Work Permit	Jan 25, 2018	---	Attorney1 Demo Client Training	Assistant1 Demo Client Training	
India	Miscellaneous	Dec 20, 2017	---	Attorney1 Demo Client Training	Assistant2 Demo Client Training	
United States	L-1 - EOS - Individual - L-1B - Regular Processing - Renewal	Nov 29, 2017	---	Attorney1 Demo Client Training	Assistant1 Demo Client Training	

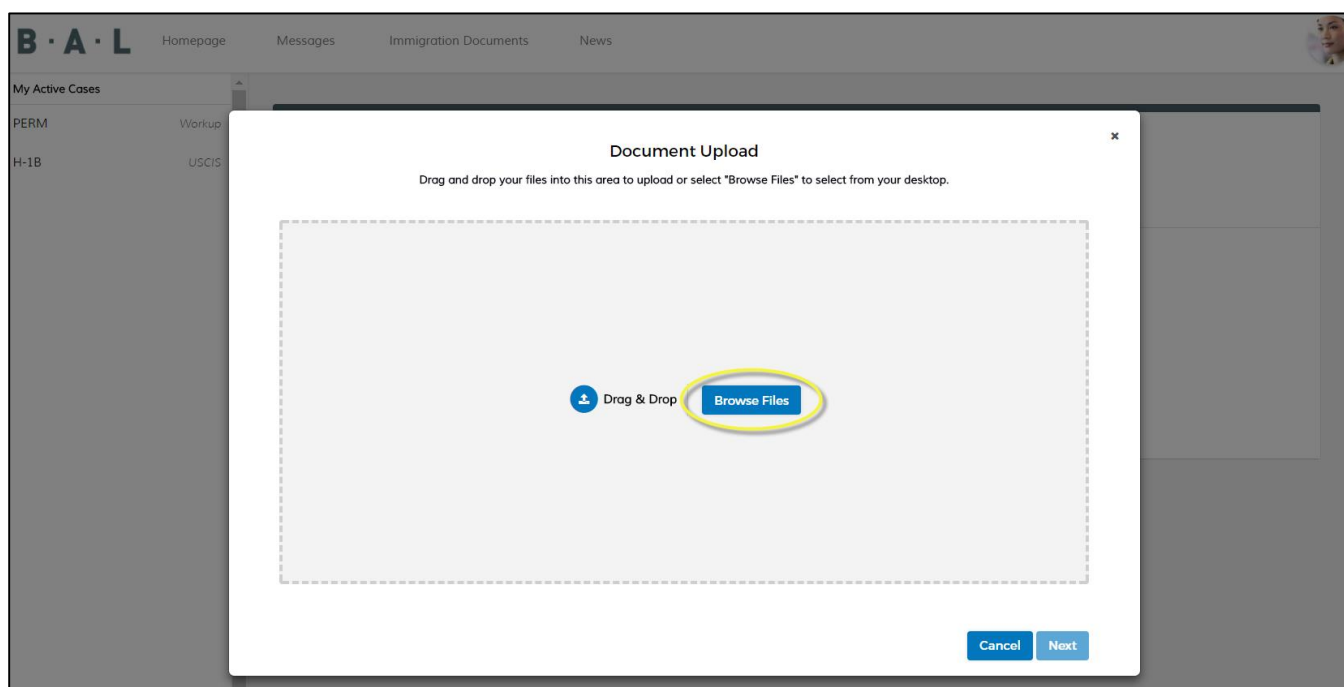
<div> <div>United States · PERM · Individual</div> <div> Jane Lim Demo Client Training 40004.1033.2 </div> <div> Timeline <b>Documents</b> </div> </div>				
<input type="checkbox"/> Document Name	Document Type	Uploaded By	Date of Upload	
<input type="checkbox"/> Birth Certificate	Birth Certificate	Jane Lim	Jan 31, 2018	⚙
<input type="checkbox"/> Diploma	Education Document	Jane Lim	Jan 31, 2018	⚙
<div> Add Document Download Print </div>				

- 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.



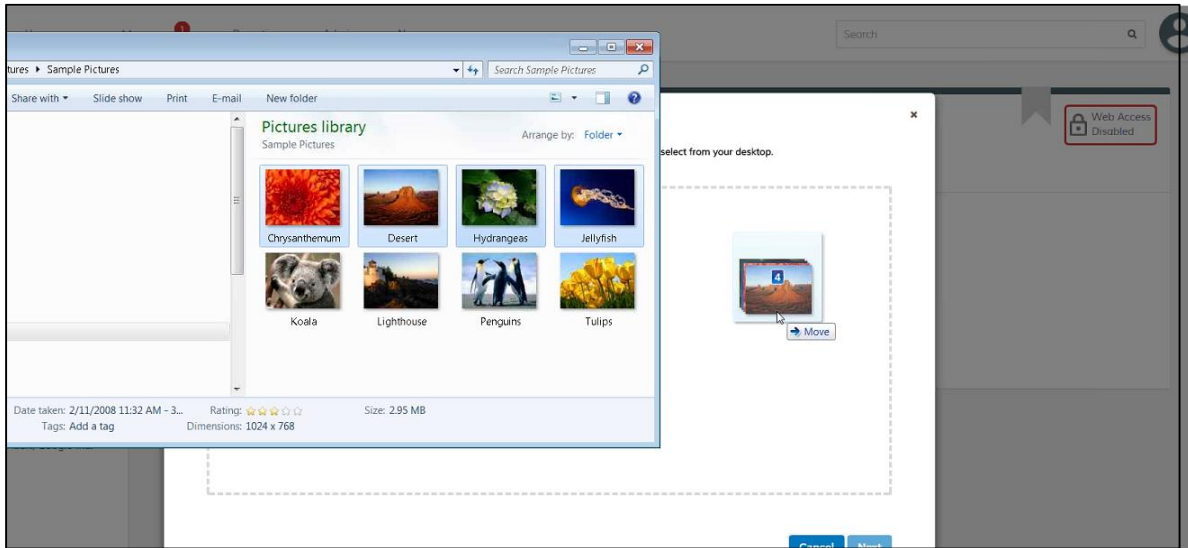
- ✓ Select Browse Files to upload documents from your computer



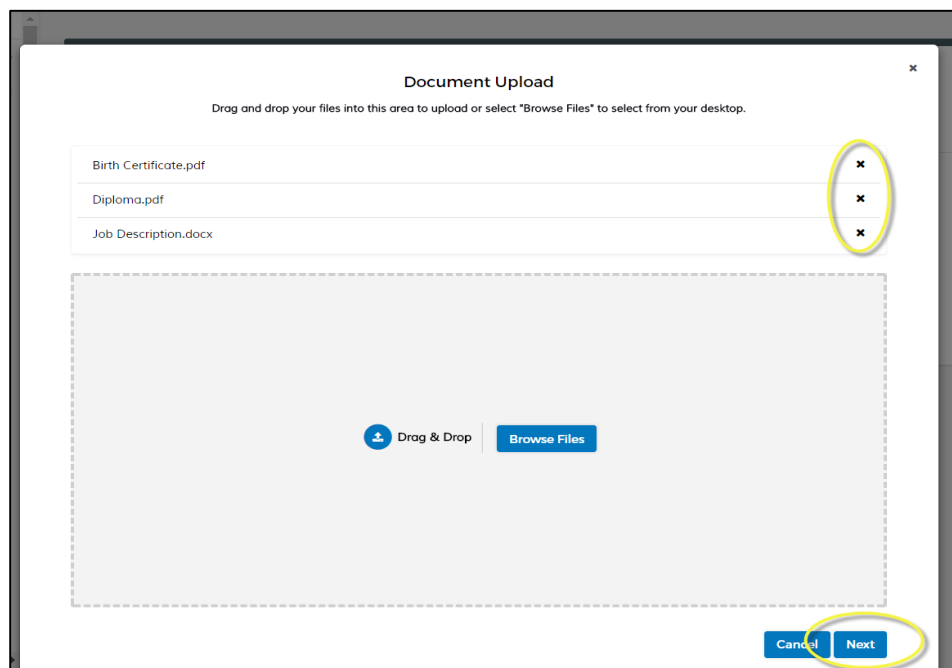
## Drag and Drop:

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



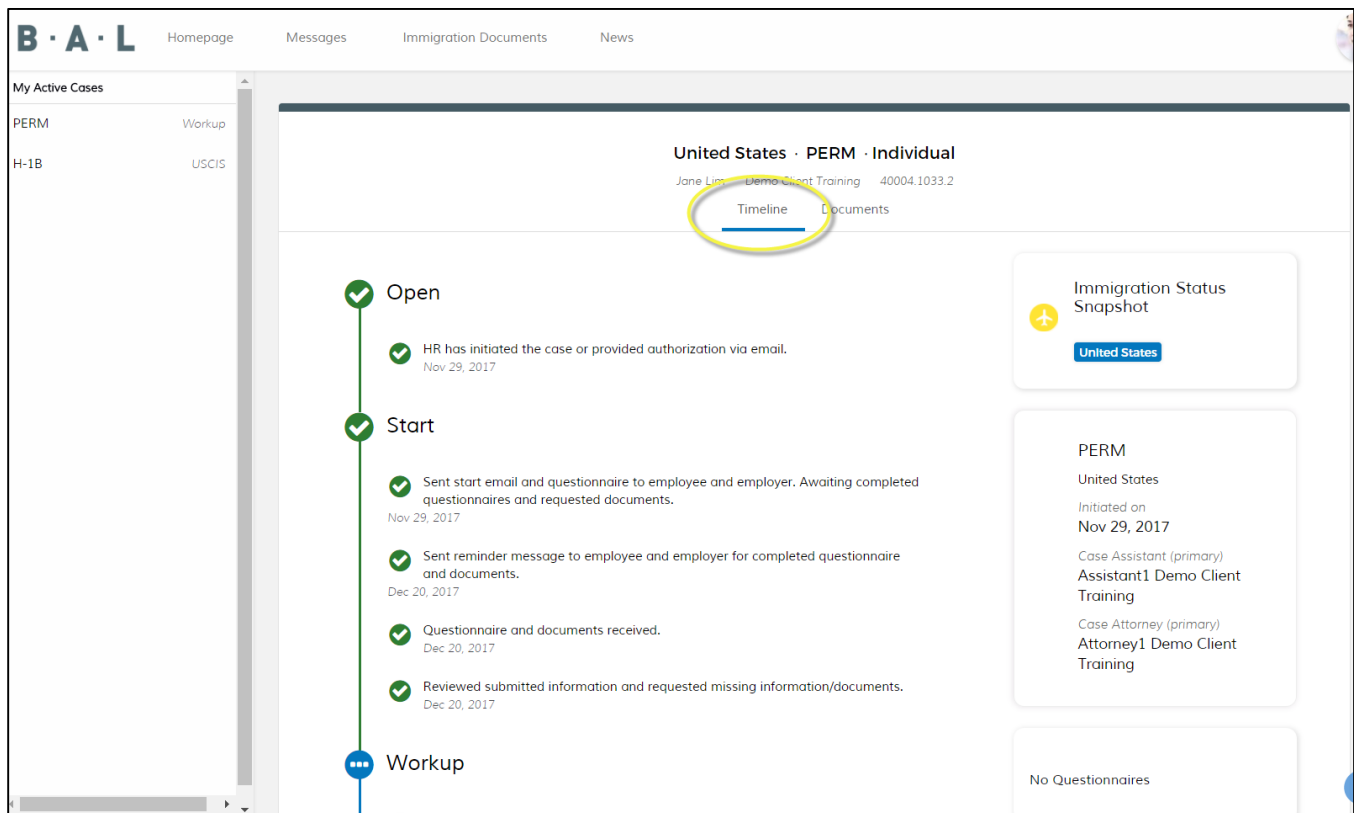
- ✓ Enter a document name and choose a document type
- ✓ Choose the document visibility
- ✓ If multiple files are selected, you have the ability to bundle them on the left-hand side and create details for them on the right-hand side. You can upload each attachment as its own file, or bundle them all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

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

Document Name	Document Type	Uploaded By	Date of Upload
Job Description	Job Description	Jane Lim	Jan 31, 2018
Birth Certificate	Birth Certificate	Jane Lim	Jan 31, 2018
Diploma	Education Document	Jane Lim	Jan 31, 2018

## 4. Timeline

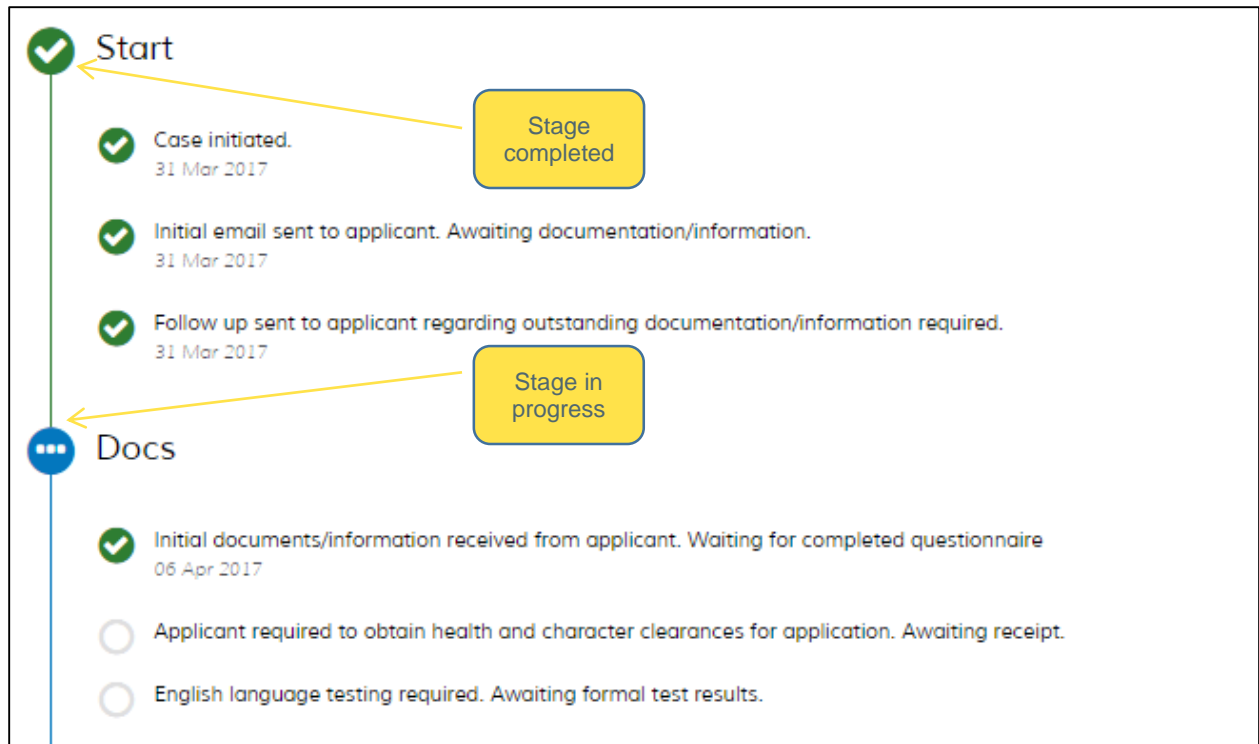
While in the case type window, user can view the timeline of the specific project. By accessing the Timeline tab at the case level, the user can easily understand the case timeline and what stage the case is at. This is a useful feature that allows the user to visually review milestones for each case, 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.

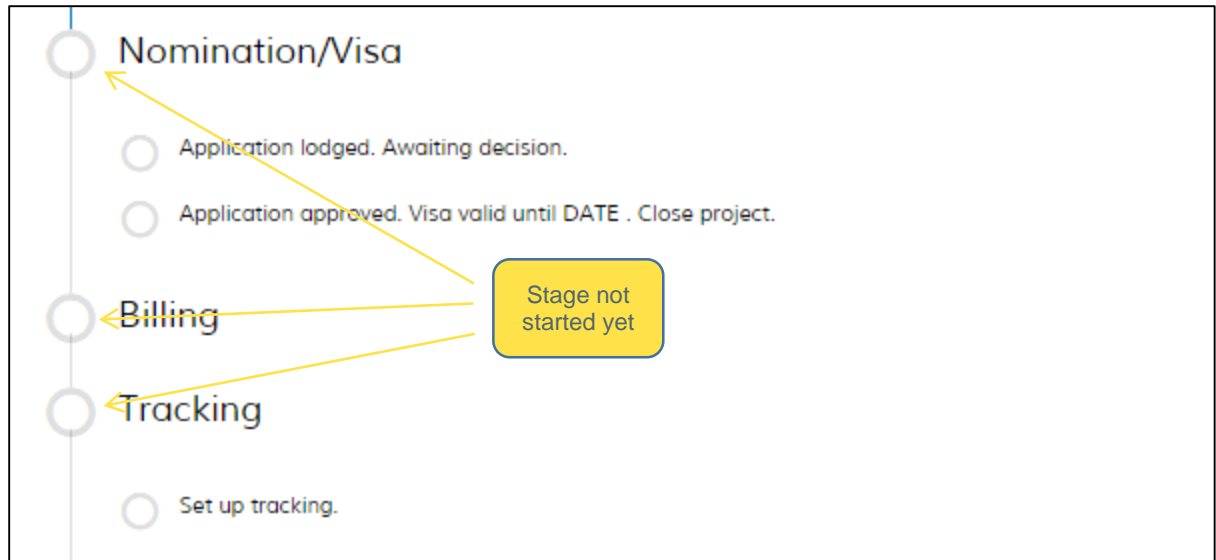
## Timeline Review

- 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.

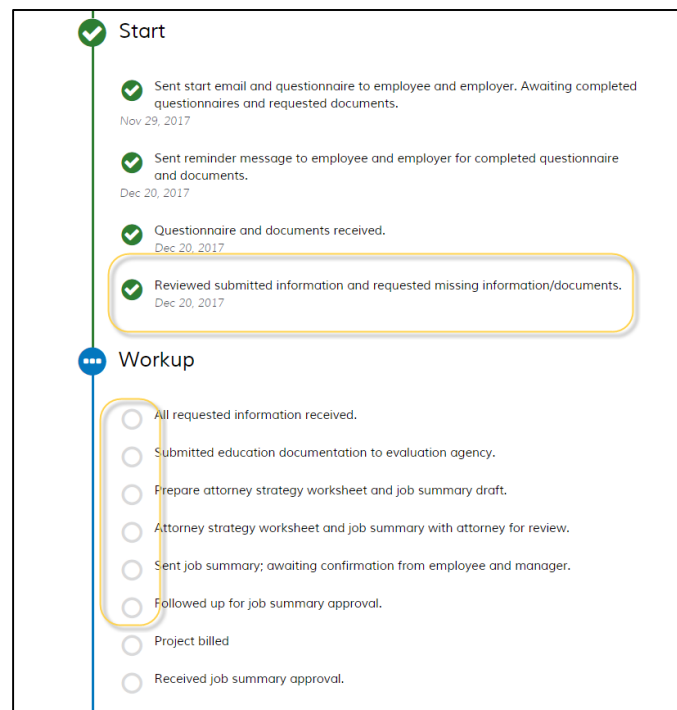




### Timeline Notes:

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.

The screenshot displays a case management interface for a United States H-1B visa application. The header shows the case details: "United States · H-1B", "Cap Counted · EOS · Regular Processing", and the user information "Jane Lim · Demo Client Training · 40004.1033.1". Below the header, there are tabs for "Timeline" and "Documents".

The "Timeline" tab is active, showing a vertical timeline of events:

- Open** (Green checkmark):
  - Initiated case. Nov 29, 2017
- Start** (Green checkmark):
  - Initial email sent to employee. Awaiting completed questionnaires and requested documents. Nov 29, 2017
- Prep** (Green checkmark):
  - Reviewed submitted information from employee and any dependents, and requested missing information. OR Initial information was received. Jan 26, 2018
  - Preparing H-1B petition. Jan 26, 2018
  - Submitted draft LCA and H-1B documents to attorney for review. Jan 26, 2018
- LCA** (Green checkmark):

On the right side, there are three panels:

- Immigration Status Snapshot**: Shows a yellow airplane icon and a blue button labeled "United States".
- H-1B**: Shows "United States", "Initiated on Nov 29, 2017", "Case Assistant (primary) Assistant1 Demo Client Training", and "Case Attorney (primary) Attorney1 Demo Client Training".
- USA H-1B Employee Questionnaire**: Shows a blue circle with three dots and the text "In Progress". This panel is highlighted with a yellow oval.

- 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.

[Import Data](#)

## James Gordon (Principal)

### Basic Information

Please ensure that the information below is accurate and up-to-date.

**Name\***

Prefix: Mr. First Name\*: James Middle Name:  Last Name\*: Gordon

**Preferred First Name**

James

**Maiden Name (if applicable)**

Type Something

**Have you ever been known by any other name(s)?**

☐ Yes

☒ No

**GBR Tier 2 General Restricted Employee Questionnaire**  
Questionnaire Form

James Gordon (Principal)

Basic Information	✓
Citizenship	✓
Languages	✓
Contact Information	✓
Current Employment	✓
Travel Itinerary	✓
Travel Plans	✓
Business Travel	✓
Contact Information While Abroad	✓
Previous Travel	✓
Additional Questions	✓
Family Members	✓

[Submit](#)

## 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.

The screenshot displays the B·A·L Secure Message system interface. At the top, a navigation bar includes 'Homepage', 'Messages' (highlighted with a yellow circle), 'Immigration Documents', and 'News'. On the left, a sidebar titled 'My Active Cases' lists 'PERM' with 'Workup' and 'H-1B' with 'USCIS'. The main content area is titled 'Secure Message Inbox' and features a 'Select a Case' dropdown menu with the placeholder 'Type Something'. Below this is a 'Create a New Message' section with fields for 'Subject' (placeholder: 'Type Something') and 'Add Recipients' (placeholder: 'Type Something'). A 'Message' text area with formatting tools (B, I, U, bulleted list, numbered list) is positioned below the recipients field. At the bottom right, there are 'Add Document' and 'Send' buttons, and a small circular icon in the bottom right corner.

- Secure Message Inbox will appear.

The screenshot displays a web interface titled "Secure Message Inbox" with an envelope icon. On the left, a sidebar labeled "Messages" contains a list of message items. The main content area is divided into two sections. The top section, "Select a Case", features a dropdown menu labeled "Case" with the placeholder text "Type Something". The bottom section, "Create a New Message", includes three input fields: "Subject" (placeholder "Type Something"), "Add Recipients" (placeholder "Type Something" with a dropdown arrow), and a large "Message" text area (placeholder "Type Something"). At the bottom right of the main area are two blue buttons: "Add Document" and "Send".

- 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.

Secure Message Inbox

Messages

Select a Case

Case

H-1B

Tier 2 - General Restricted

Subject

Type Something

Add Recipients

Type Something

Create a New Message

- 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).

Secure Message Inbox

Messages

Case

Tier 2 - General Restricted

Create a New Message

Subject

Type Something

Add Recipients

Attorney1 Demo Client Training (BAL Attorney)	Primary
Assistant1 Demo Client Training (BAL Assistant)	Primary

HR Mgr 1 Demo Client Training (Signer)

HR1 Demo Client Training (HR Contact)

Mgr 1 Demo Client Training (Manager)

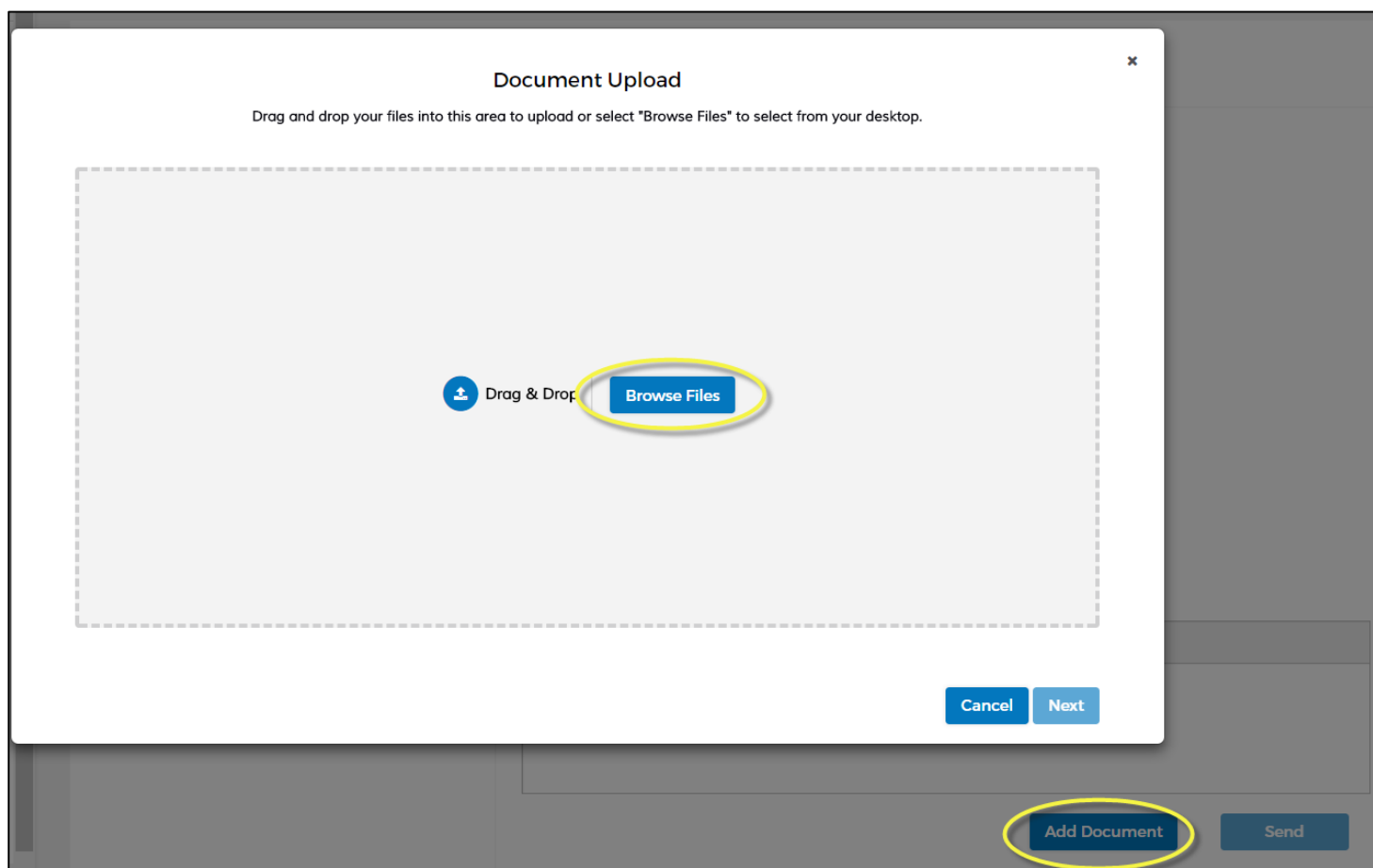
Attorney1 Demo Client Training (BAL Attorney)

Assistant1 Demo Client Training (BAL Assistant)

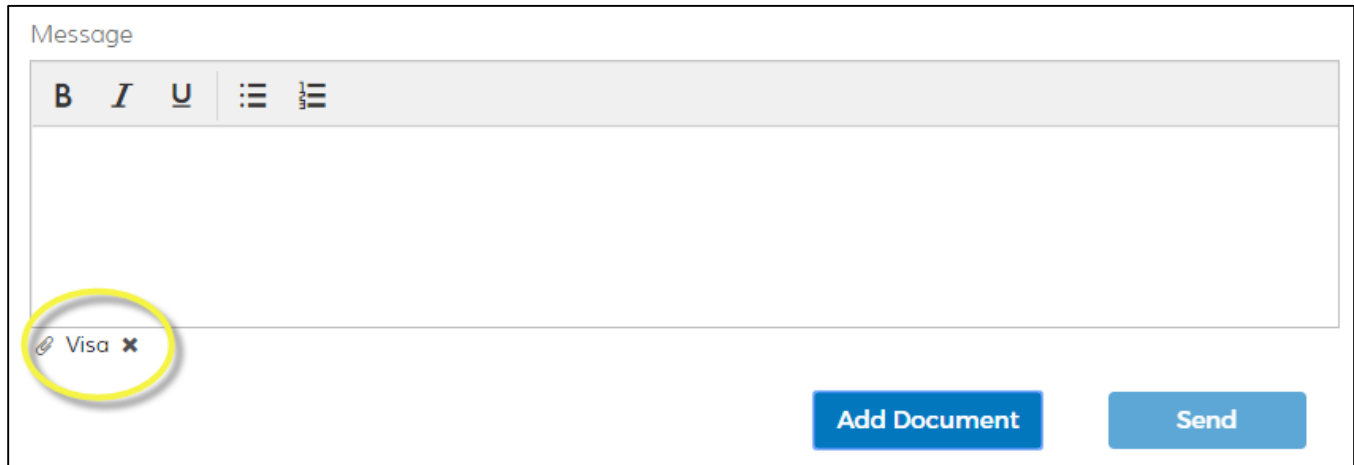
Add Document

Send

- 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.



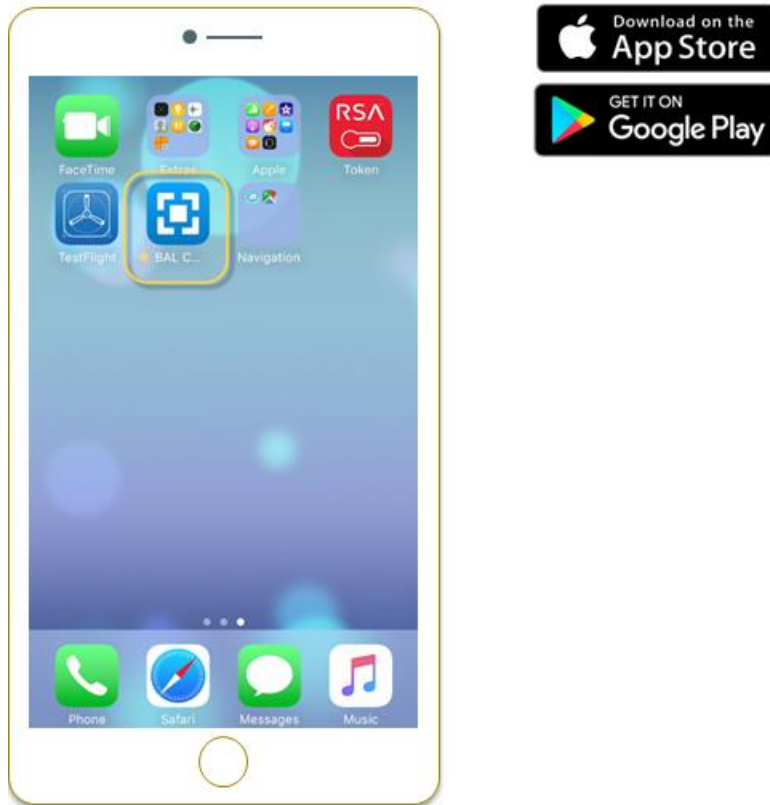
- Clicking the x will remove the document
- You can upload and send multiple documents with the secure message.
- When finished composing the message, click Send.



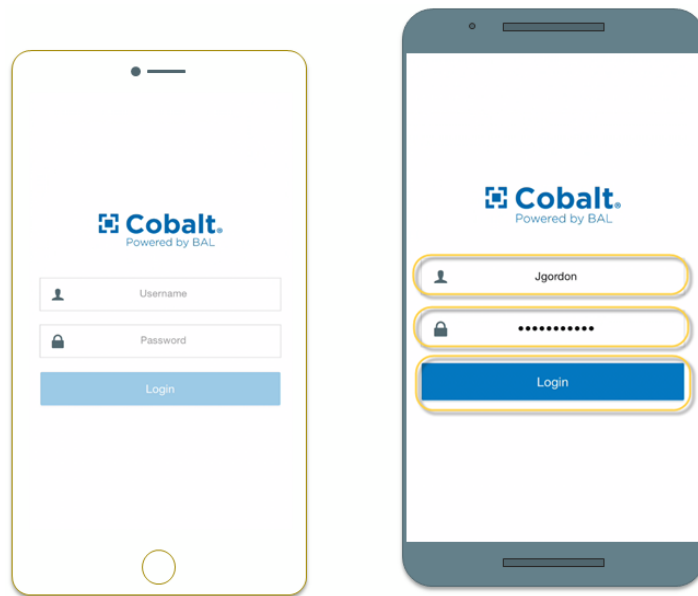
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## 6. Mobile Application

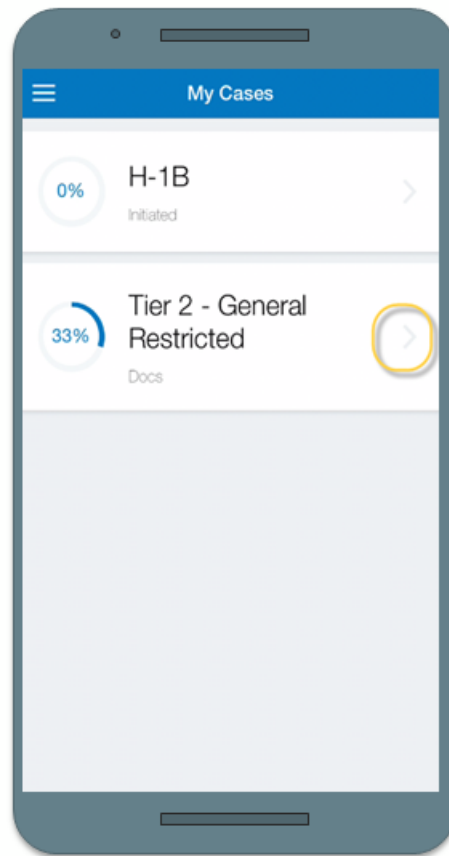
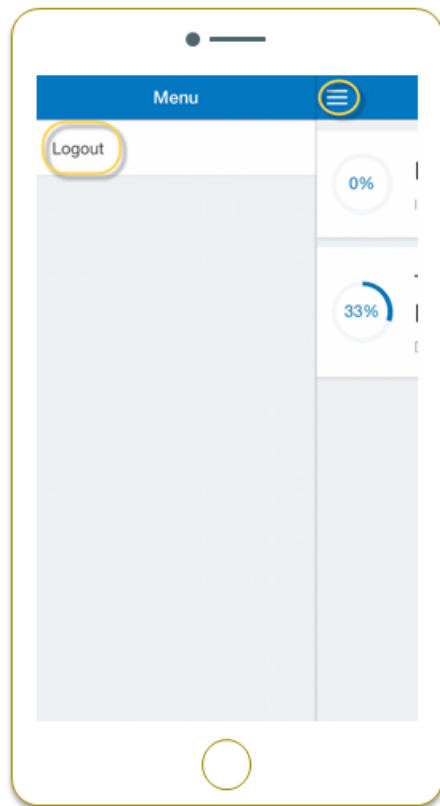
To access the mobile app, the user must download the BAL Cobalt app.



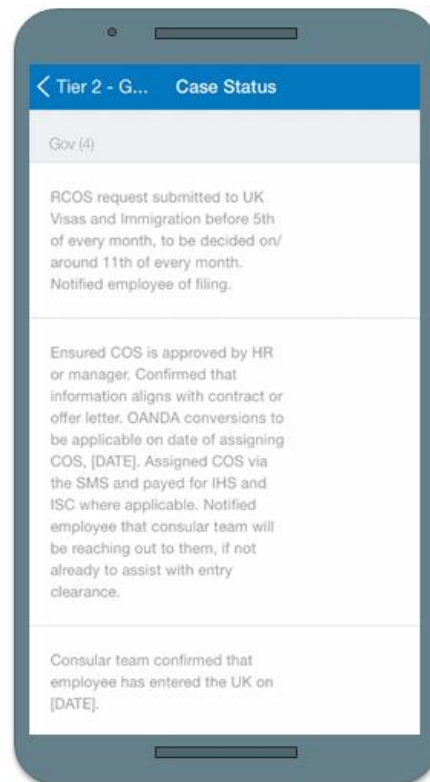
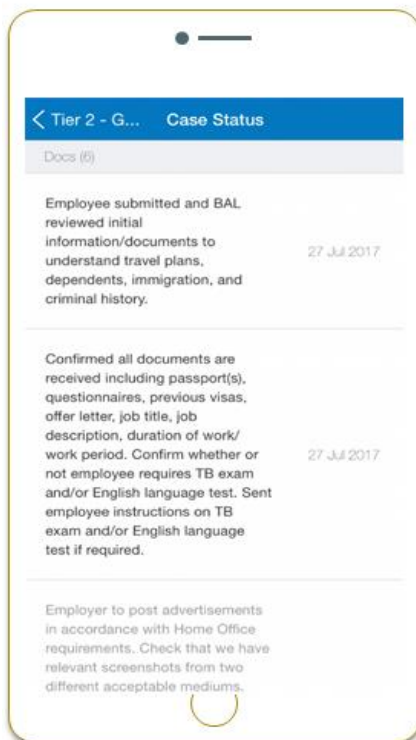
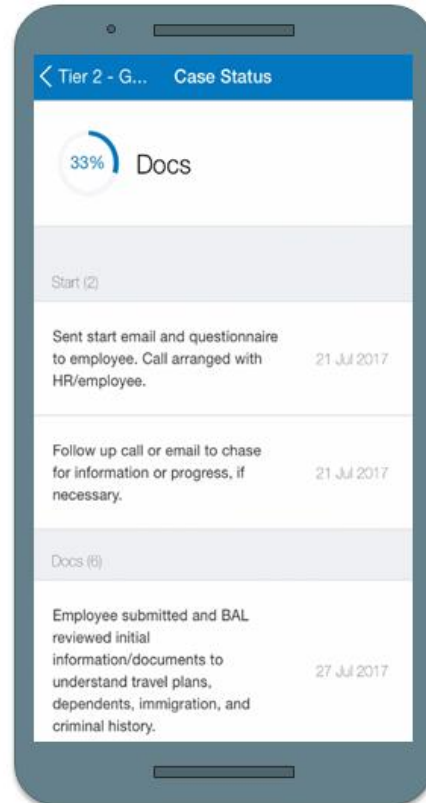
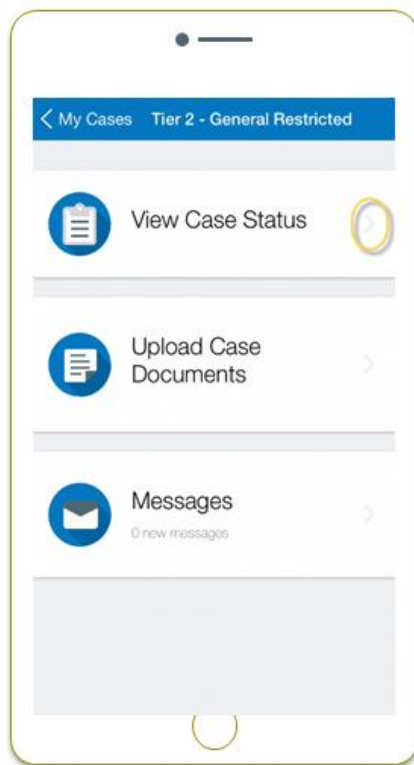
Proceed to login by opening the app and typing in the username and password.



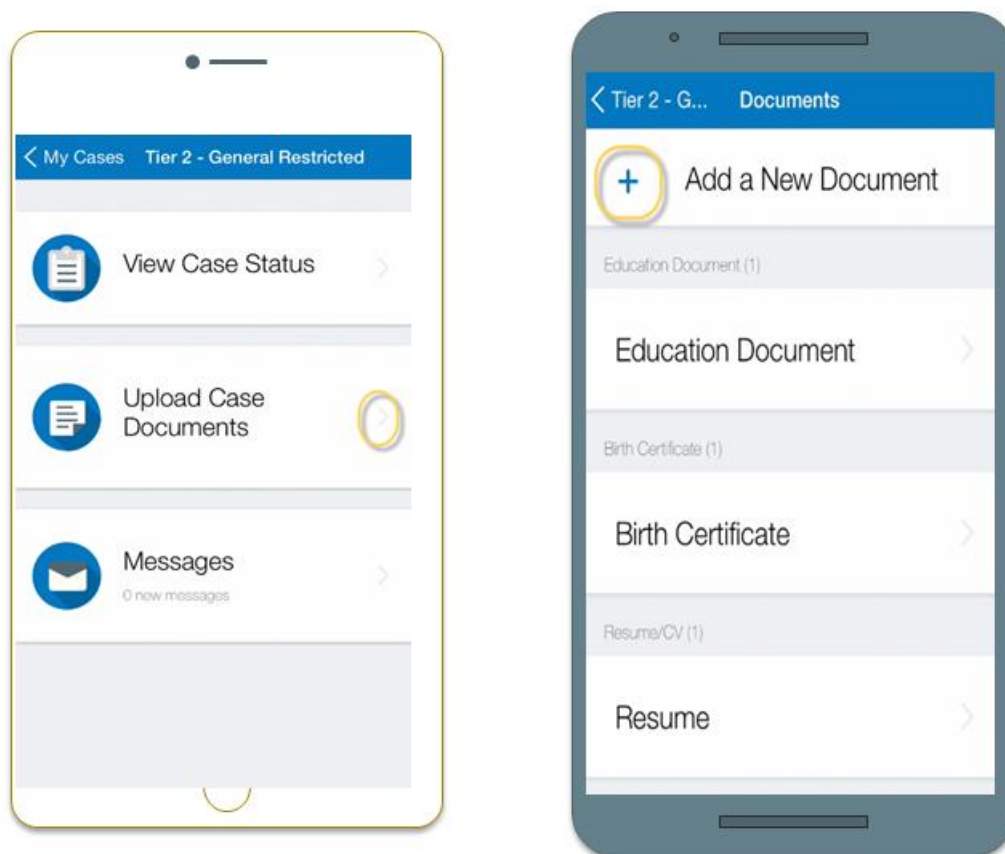
- The app will open to “My Cases” page, which will list all open projects for the user and the percentage progress for each project and the state each project is at.



- 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.




- 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 

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



< Documents New Document Save


Document Name \*

Passport

Document Type \*

Passport

Upload a copy of your document \*

0BCD5F4D-E379-4240-BDBD-950374F4... 

Select Files

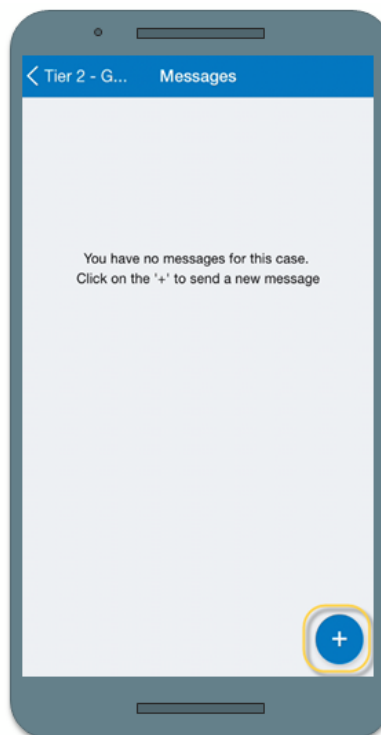
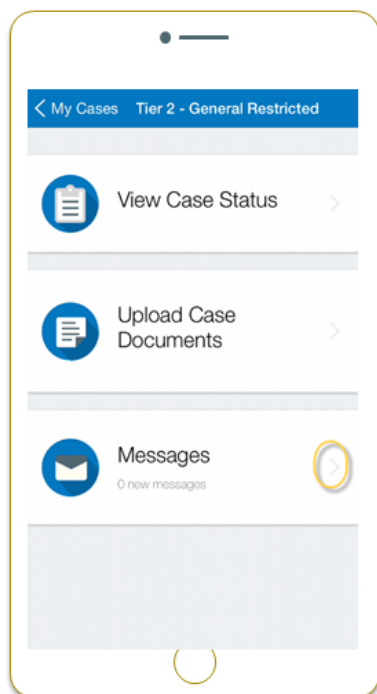
Issued To \*

James Gordon

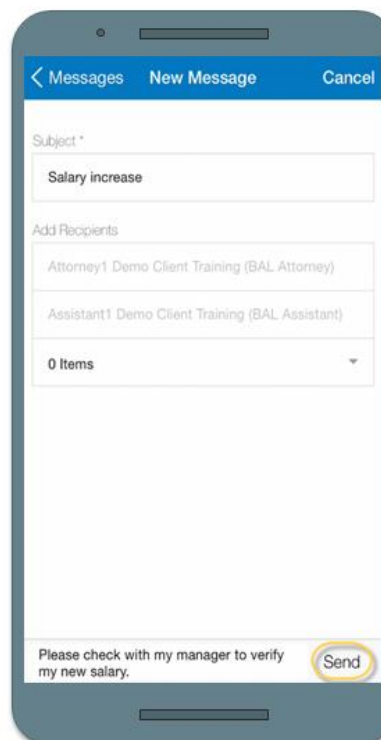
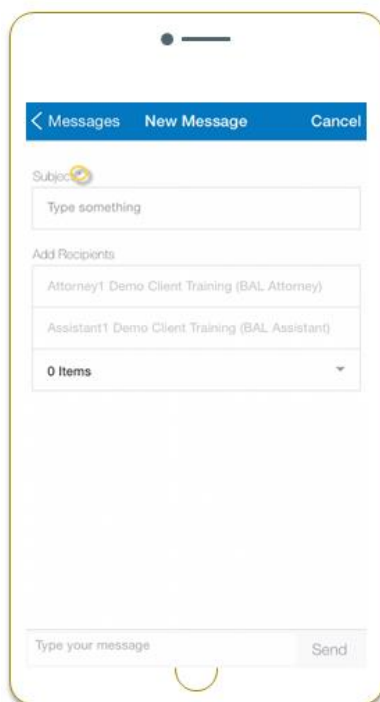
Country \*

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.