

# **Client Portal**

# Person (Assignee/Foreign National)

The Fragomen Connect Client Portal provides a dynamic and interactive interface that enables Fragomen clients to gather information and transmit data in a secure and efficient manner.



Access your immigration experience from any device with our responsive Client Portal (immigration.fragomen.net).

**Note:** Clients with single-sign-on (SSO) who desire mobile access should reach out to their Fragomen Team for support.

This document illustrates how to:

- Access Mobile Client Portal
- Action TO-DO LIST items
- View My Profile
- View Case Progress
- Upload, Download, Preview and Edit Documents
- Update Information

# **Mobile Client Portal**

To add a link to the Client Portal to your device's home screen:

- Access immigration.fragomen.net on your device's browser.
- 2. Click the ( ① ) icon in Apple devices or (\*) icon in Android.
- 3. Select Add to Home Screen.

**Note:** The Client Portal is not available in an App store.

### **How to Action TO-DO LIST Items**

The **TO-DO LIST** is customized to each User. It contains:

- Questionnaires sent by Fragomen
- Documents requested to be uploaded or approved
- Forms ready for review and/or signature

The **TO-DO LIST** is located in the Navigation Bar for desktop and tablet users, and through the notification icon ( ) for mobile users.

The number in the red circle indicates how many items require the User's attention on the **TO-DO LIST**. As items are completed or removed, the number will adjust accordingly.



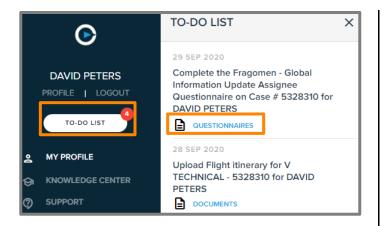
**Note:** Users may experience a delay (up to 90 seconds) for the item count to update.

#### Questionnaires

Questionnaires can be edited and submitted directly from the **TO-DO LIST** for desktop and larger tablet users. Mobile users will be alerted to access the Questionnaire on a larger screen.



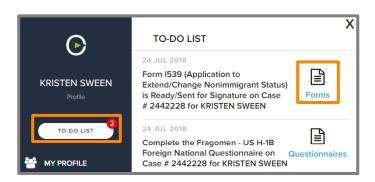
To complete and submit the Questionnaire, click **TO-DO LIST**, then click **Questionnaires** next to the intended Questionnaire.



- Complete the Questionnaire. All required fields (\*)
  must be completed. Refer to the FC ClientPortal
  Questionnaire Help document attached to the email sent from connectsupport@fragomen.com
  with Subject: A Fragomen Questionanire is Ready
  for Your Input [PERSON FIRST NAME LAST
  NAME]
- When the Questionnaire is complete, it will be removed from your TO-DO LIST and you will receive an email notification once it has been processed by Fragomen.

#### **Forms**

To review, print and sign Government Forms made available on the Client Portal, click **TO-DO LIST**, then click **Forms**.



A PDF of the Form will open. Use the browser options to **Rotate**, **Download** or **Print** the Form.



**Note:** Forms on the **TO-DO LIST** are removed by the Fragomen Representative.

# **How to View My Profile**

Pages found in My Profile display:

- Overview: All immigration-related data and Expiration Dates
  - The **Person Overview** page will only be visible if it contains information.
  - The Person record will land on the Cases page if no information is available under Person Overview.
- Cases: Progress Bar for all Cases
- Documents: Placeholders to upload, download and view Documents
- Pending Questionnaires: All pending Questionnaires sent from the Fragomen team
- Biographical: Citizenship and basic information for the Person, Paternal and Maternal
- Employment: Current and/or previous employment history. This page will only be visible if it contains information.
- **Dependents**: Basic and immigration information

Mobile device users can scroll left or right to access different pages.

# **How to View Case Progress**

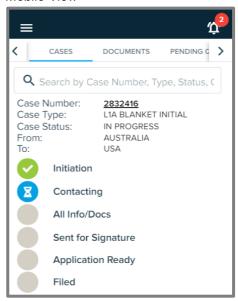
Case Progress can be viewed on the **CASES** page. A Progress Bar will display for each **Active** (In Progress or Not Started) Case, by default.

To view **Inactive** or **Closed** Cases, click **SHOW ALL CASES**.

#### Desktop View



#### Mobile View



Estimated \*Travel and \*Work ready dates may be configured for the Case Type but **note:** 

Travel plans and start dates should not be made, amended, or confirmed based on the dates on the graph or steps detail. Critical Dates are calculated based on the last completed step in the application process and based on estimated overall processing time of prior applications. These dates should be used as a guideline only, as case circumstances and the processing times of governmental immigration offices can vary widely. Please contact your Fragomen advisor prior to making, amending, or confirming any travel plans or assignment start dates.

## **Progress Bar**

Each Case Progress Bar is broken down into Benchmarks required to process the Case. The progress is reflected in the following colors:

- Green: Benchmark is completed. Hover to see the completed date.
- Blue: Next Benchmark to be completed.
- Grey: Benchmark is not completed but upcoming.



To see additional actions completed in between the Benchmarks, click **SHOW CASE HISTORY**.



# **How to Manage Documents**

Documents can be uploaded, downloaded or viewed on the **DOCUMENTS** page.

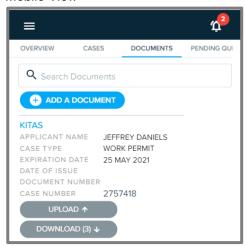


Documents are sorted by Expiration Date, with the next upcoming. Use the **Search Documents** field to filter by criteria listed on page.

#### Desktop View



#### Mobile View



# **Upload a Document**

Use the **Search Documents** bar to filter for the Document. Click **UPLOAD** and follow the prompts.



The Fragomen Representative will receive notification when a Document is uploaded.

# **Download a Document**Use the **Search Documents** bar to filter. Click **DOWNLOAD**.



- The number in parentheses indicates how many Documents are available to be downloaded.
- The DOWNLOAD button will only be available if a Document has been uploaded into the placeholder.

# **Preview a Document**

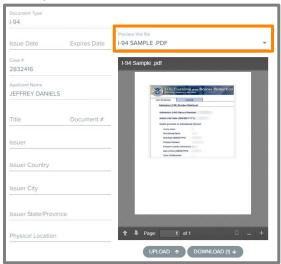
Use the **Search Documents** bar to filter for the Document, then click the Document title. A preview will display in the pop-up if the Document uploaded is an image or PDF.



Select the Document from the **Preview this file** dropdown list:

- To preview non-PDF/image files.
- If multiple Documents are in the Document Placeholder.

# Desktop View



#### **Edit a Document**

Use the **Search Documents** bar to filter, then click the Document title.

Make edits in the pop-up, then click **Save** at the bottom. The Fragomen Representative will receive notification the Document was edited.

**Note:** Mobile View - Editable fields are below the Document Preview

# Mobile View



#### **Needed Documents**

If Fragomen needs a Document, the person responsible for providing the Document will see an orange flag next to the title, their name in orange font and the **UPLOAD** button in orange.

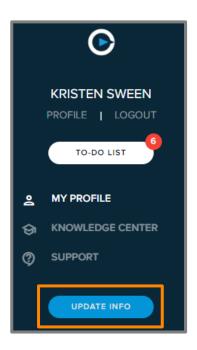


If a different User is responsible for providing the document, the flag, name and **UPLOAD** button will still appear but in grey.

# **How to Update Information**

**Update Information Questionnaire** 

Click **UPDATE INFO** from the Navigation pane to update existing information that may have changed (e.g., name, marital status, primary residence address).

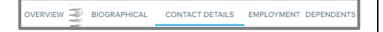


#### **Mailing Address**

The mailing address is where the Fragomen Representative will send or return original Documents (i.e., location where you receive mail when traveling). Mailing address does <u>not</u> have to be the same as primary residence address.

To view, edit and confirm your current mailing address:

 Click the CONTACT DETAILS tab from MY PROFILE.



- Click ADD ADDRESS. Any addresses previously provided to Fragomen will display in the pop up window.
- 3. Select from the addresses we have on file or select **Add a new address**.

**Note**: If the new address does not appear in the search, enter manually.

 Click SAVE ADDRESS. This address can be updated by clicking EDIT.

A notification is sent to your Fragomen representative.

#### Note:

- If you have a Case Status of IN PROGRESS six

   (6) months after the latest update to the current mailing address, the following will be sent to you as a reminder to update or confirm the current mailing address on file:
  - Automatic email:
    - From connectsupport@fragomen.com
    - Subject Fragomen Connect: Confirm your mailing address is up-to-date
  - An action on the TO-DO LIST
- Company Contacts do <u>not</u> have access to view the CONTACT DETAILS tab.

# **NEED HELP?**

For links to videos and guided walk-throughs, click **Self Help** and search by keyword.



For questions, contact your Fragomen Representative or Connect Support.