



## Checklist: 15 Features to Look for Before Choosing Immigration Software

Choosing the right immigration software is a critical decision for law firms, HR professionals, and petitioners. With increasing caseloads, evolving compliance standards, and the need for streamlined workflows, the right platform can make or break your efficiency. But with so many options out there, how do you know which one's right for you?



Here's a comprehensive 15-point checklist to guide your evaluation and ensure you choose immigration software that delivers real results

- ☐ **End-to-End Case Management**  
Look for software that covers the full petition lifecycle, from intake to filing, so you're not juggling multiple tools.

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- ☐ **Petition Building Automation**  
Does the platform help build petitions step-by-step with pre-filled forms, templates, and checklists? Automation reduces human error and improves accuracy.

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- ☐ **Built-in Compliance Tools**  
Ensure the software stays up-to-date with USCIS requirements and provides alerts for potential issues, like expiring LCAs or missing signatures.

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- ☐ **AI-Powered Petition Review**  
Look for tools that allow team members to collaborate in real-time, share feedback, and communicate effectively throughout the case management process.

- ☐ **I-9 and E-Verify Integration**  
For employers, seamless I-9 management and E-Verify integration are essential to maintain workforce compliance.
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- ☐ **Secure Document Management**  
A centralized, cloud-based document repository should allow for version tracking, encrypted uploads, and role-based access.
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- ☐ **Real-Time Status Tracking**  
You and your clients should always know the status of a petition or application, without sending dozens of emails.
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- ☐ **Customizable Workflows**  
Immigration processes vary by visa type and organization. Your software should adapt to your process, not the other way around.

- ☐ **Client and Beneficiary Portals**  
Separate, secure portals for attorneys, petitioners, and beneficiaries keep communication and document sharing organized and transparent.
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- ☐ **Mobile Access**  
Whether you're in court, at a client site, or traveling, mobile-friendly software keeps you productive on the go.
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- ☐ **Integrated Billing & Invoicing**  
For law firms, built-in time tracking, billing, and payment features simplify client management and revenue flow.
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- ☐ **Intelligent SOC Code Recommendation**  
Choosing the right SOC code can make or break a case. AI-enabled suggestions based on job duties are a game-changer.

☐ **OCR and Data Extraction**

Optical Character Recognition (OCR) tools extract data from resumes, passports, and prior petitions to save hours of manual entry.

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☐ **Custom Reporting & Audit Trails**

Audit-ready logs of every action and customizable reports make compliance reporting and FDNS site visits less stressful.

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☐ **Scalability & Support**

Whether you're a solo attorney or a large law firm, the software should scale with your needs and offer prompt customer support when issues arise.

**Final Thoughts**

Immigration software isn't just a productivity tool, it's your partner in delivering accurate, timely, and compliant legal services. By using this checklist, you can evaluate solutions more confidently and choose a platform that supports your goals, your clients, and your growth.

**Looking for a solution that checks all 15 boxes?**

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