

Collect and review documents

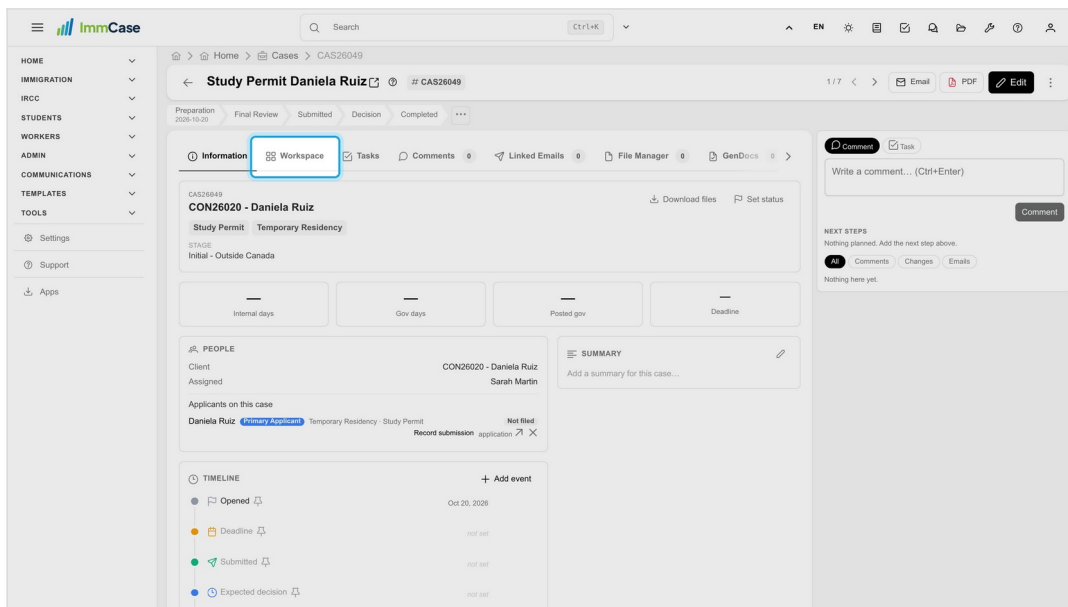
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Every person on a case has a **document checklist**: the passport, photo, bank statements and so on that the application needs. In the case's **Workspace** you upload each document, look at it, and **accept** it or ask for a replacement. The bar at the top shows how much of the file is ready.

The client («Daniela Ruiz») and the passport in this guide are **fictional**; the document is a specimen stamped NOT VALID.

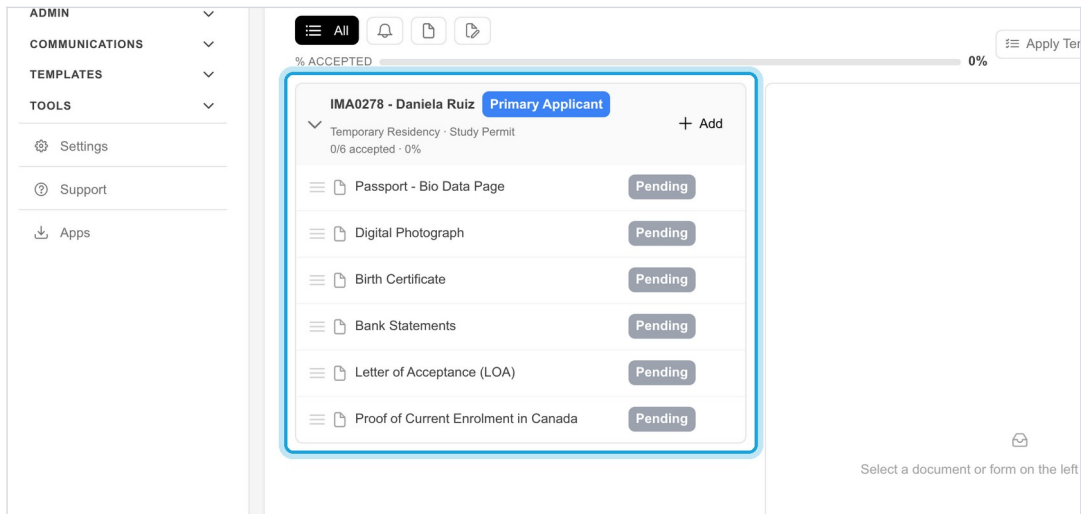
1. Open the Workspace

Open the case and click the **Workspace** tab.



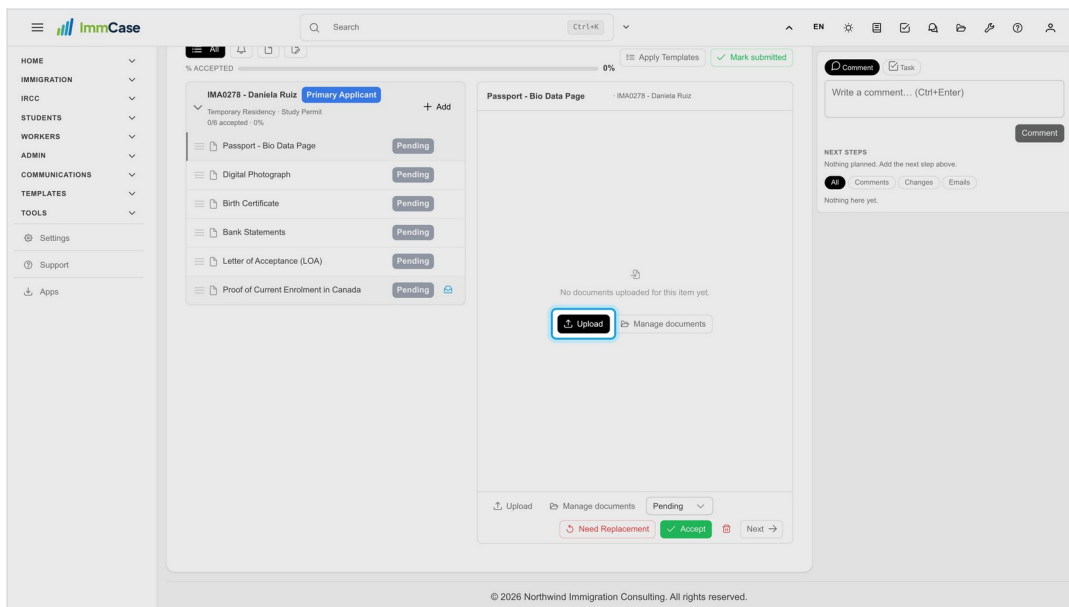
2. The checklist

Each person on the case has their own list. Every document starts as **Pending**; the counter under the name shows how many are accepted.



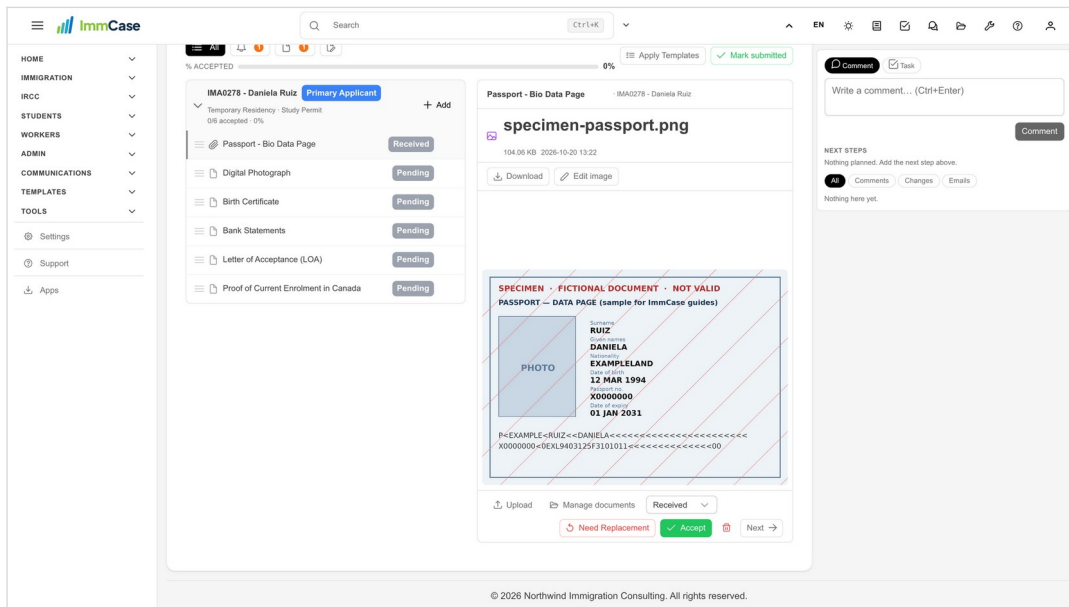
3. Upload the document

Click a document in the list, then **Upload** and choose the file the client sent you. **Manage documents** picks one already in the case's files instead.



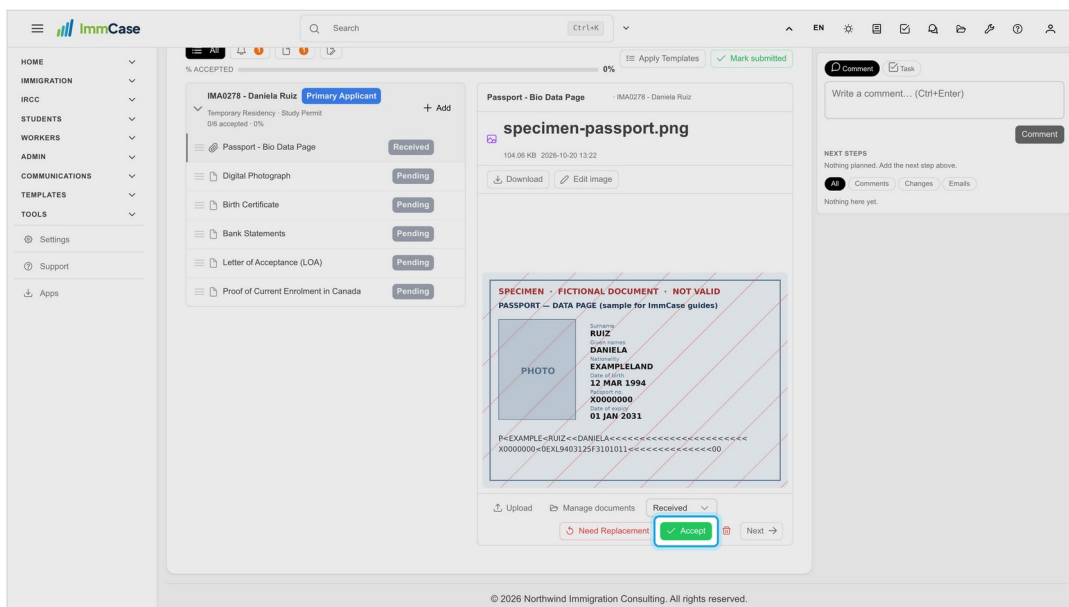
4. Check it

The file opens right beside the list and the item becomes **Received**. Check it is the right document, complete and readable.



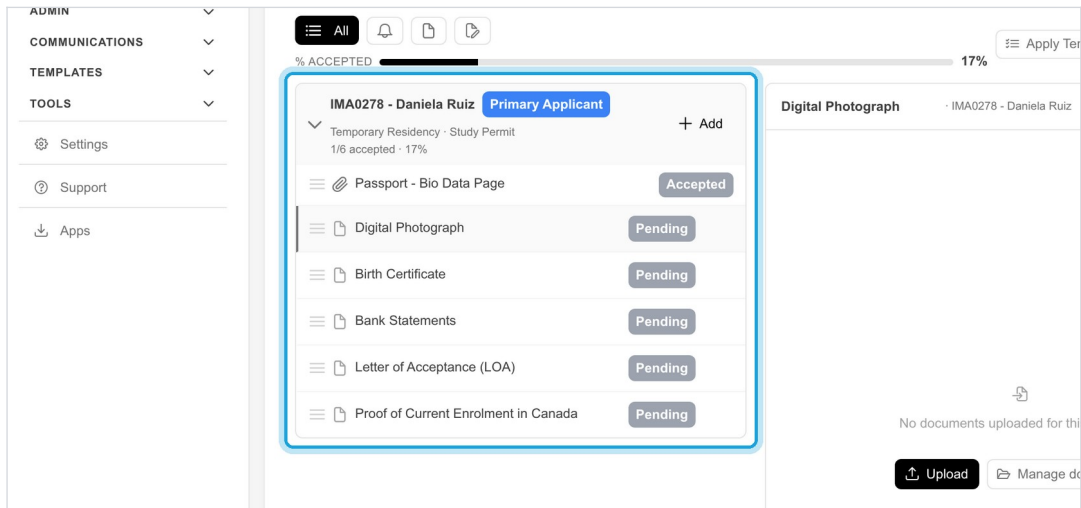
5. Accept, or ask again

Click **Accept** if it is good. **Need Replacement** marks it to be sent again, for example when a page is cut off or the passport has expired.



6. Watch the file fill up

The item turns **Accepted**, the bar shows the share of the case that is ready, and the next document opens so you can keep going.



Good to know

- **Clients can upload too.** Through the client portal they send documents straight into their own checklist; you only review.
- **Missing something? Add,** next to the person's name, puts an extra document on their list.
- **Your firm's checklists** live in **Templates → Checklist Templates**; edit them once and every new case uses them.

Questions: hello@immcase.com.