

IMMCASE USER GUIDE

How to open a case

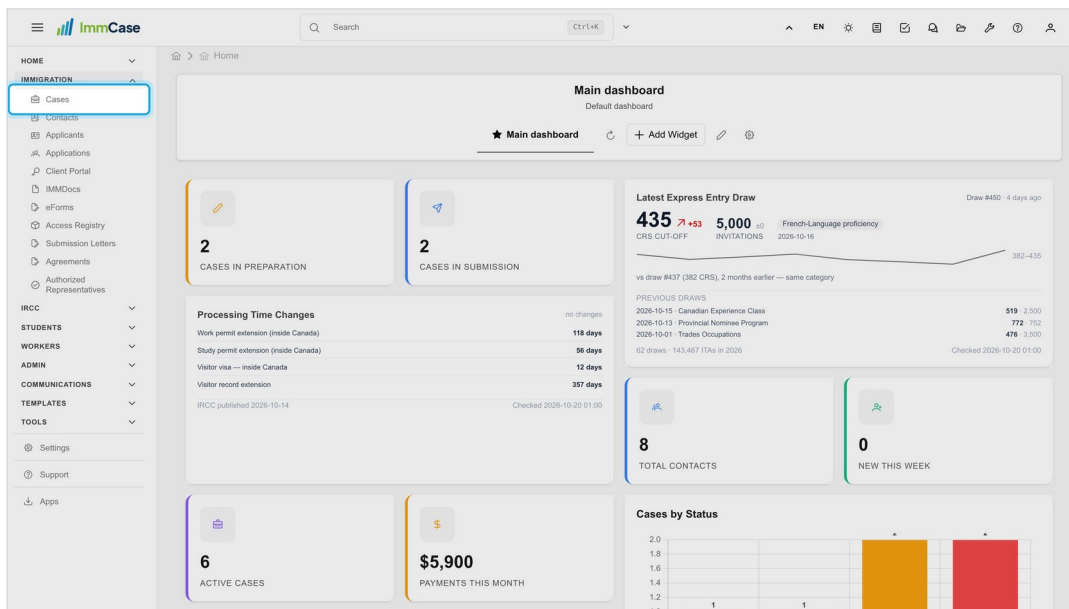
ImmCase · guides.immcase.ca · 2026-10-20

A **case** is the file for one immigration matter, such as a study permit. The **New case** wizard sets it up in four short steps: the client and program, the people on the case, a document checklist for each person, and a last review. It creates the case, each person's **applicant** profile and **application**, and their checklists in one go.

Every screen in this guide comes from ImmCase itself, filled with a **fictional** client («Daniela Ruiz») and firm («Northwind Immigration Consulting»).

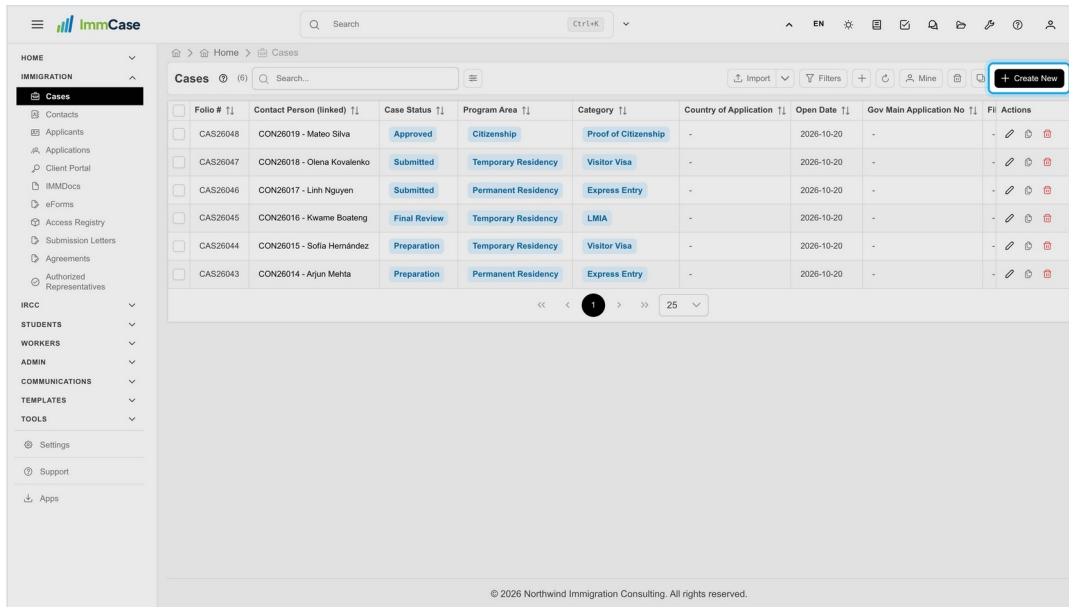
1. Open Cases

In the left menu, open **Immigration** and click **Cases**.



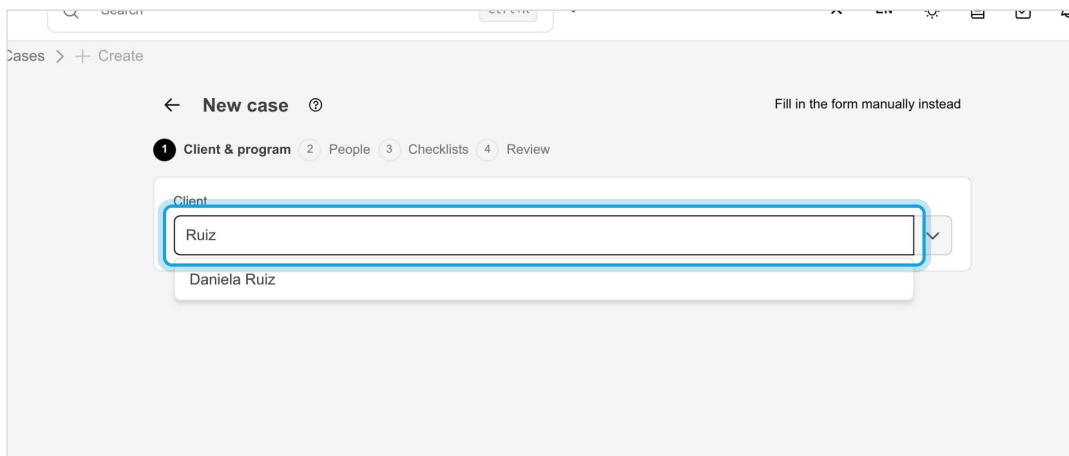
2. Start the wizard

Click **Create New**. The **New case** wizard opens.



3. Pick the client

Type part of the client's name and pick their **contact** from the list.



4. Program

Choose the **program area** (e.g. Temporary Residency), then the **category** (Study Permit). **Filing stage** says whether this is a first application from outside or inside Canada, or an extension: IRCC publishes different processing times for each. **Consultant** is you unless you assign a colleague. Click **Next**.

← New case ⓘ Fill in the form manually instead

1 Client & program 2 People 3 Checklists 4 Review

Client: Daniela Ruiz · daniela.ruiz@immcasedigital.ca

Program area: Temporary Residency × ▾

Category*: Study Permit × ▾

Sub-category: Choose... ▾

Stream: Choose... ▾

Filing stage*: Initial - Outside Canada ▾

Consultant: Sarah Martin ▾

IRCC publishes different processing times for an initial application and an extension.

Next →

5. The people on the case

The client is the **primary applicant**. If a spouse or children apply with them, click **Add spouse or dependant** for each; every person gets their own applicant profile and application. Click **Next**.

ses > + Create

← New case ⓘ Fill in the form manually instead

1 Client & program 2 People 3 Checklists 4 Review

Who the case is for
Daniela Ruiz - a new applicant profile will be created

+ Add spouse or dependant

Back

Next →

6. A checklist for each person

Pick the **document checklist** for each person, here «Study Permit». Next time, ImmCase pre-picks the one your firm used last for that application type. Click **Next**.

The screenshot shows the 'New case' form at step 3, 'Checklists'. The progress bar at the top indicates steps: 1 Client & program, 2 People, 3 Checklists (active), and 4 Review. The main content area contains a text box with the name 'Daniela Ruiz' and the role 'Primary applicant · Study Permit'. To the right is a dropdown menu currently showing 'Study Permit'. Below this is a 'Back' button and a 'Next →' button. A blue box highlights the entire form content area. At the top right of the form, there is a link that says 'Fill in the form manually instead'.

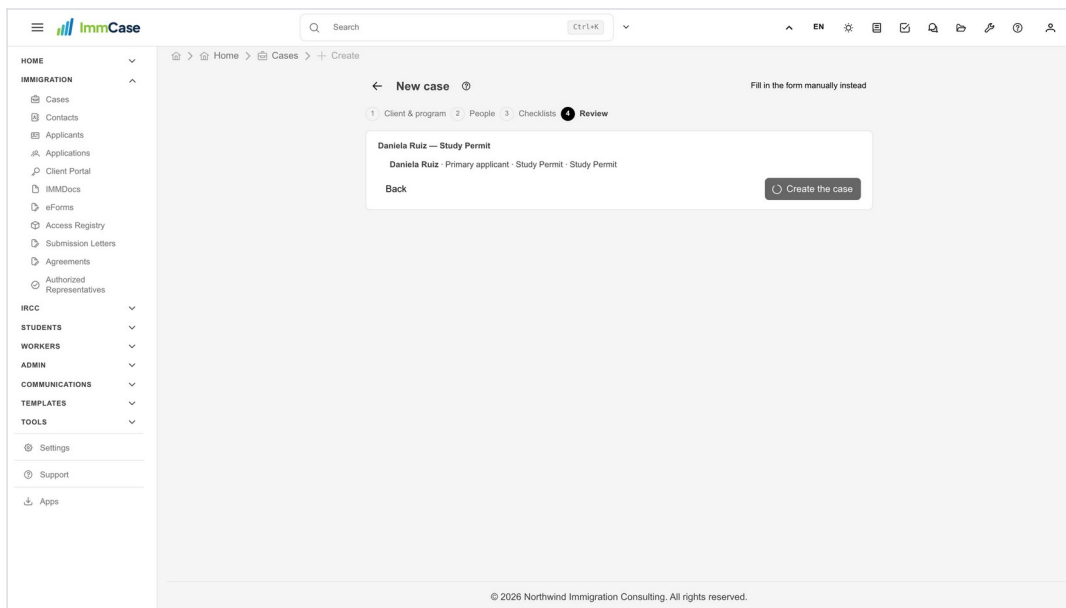
7. Review and create

Check the summary and click **Create the case**. **Back** takes you to any earlier step.

The screenshot shows the 'New case' form at step 4, 'Review'. The progress bar at the top indicates steps: 1 Client & program, 2 People, 3 Checklists, and 4 Review (active). The main content area displays a summary: 'Daniela Ruiz — Study Permit' followed by 'Daniela Ruiz · Primary applicant · Study Permit · Study Permit'. Below this is a 'Back' button and a '✓ Create the case' button. A blue box highlights the entire form content area. At the top right of the form, there is a link that says 'Fill in the form manually instead'.

8. Your case is open

The case gets its own number (CAS...) and opens on **Information**: the client, the applicants on the case, the stage bar from **Preparation** to **Completed**, and the timeline of key dates. **Workspace** holds the checklist and documents; **Tasks**, **Comments**, **Linked Emails** and **File Manager** keep the rest of the work in one place.



Good to know

- **The client must exist first.** Create the contact, then open the case for them.
- **Only one field is required on the first step: the category.** Sub-category and stream narrow it down when they apply.
- **Prefer a plain form? Fill in the form manually instead,** top right of the wizard, opens the full case form.

Questions: hello@immcase.com.