

IMMCASE USER GUIDE

See all of a case's documents at once

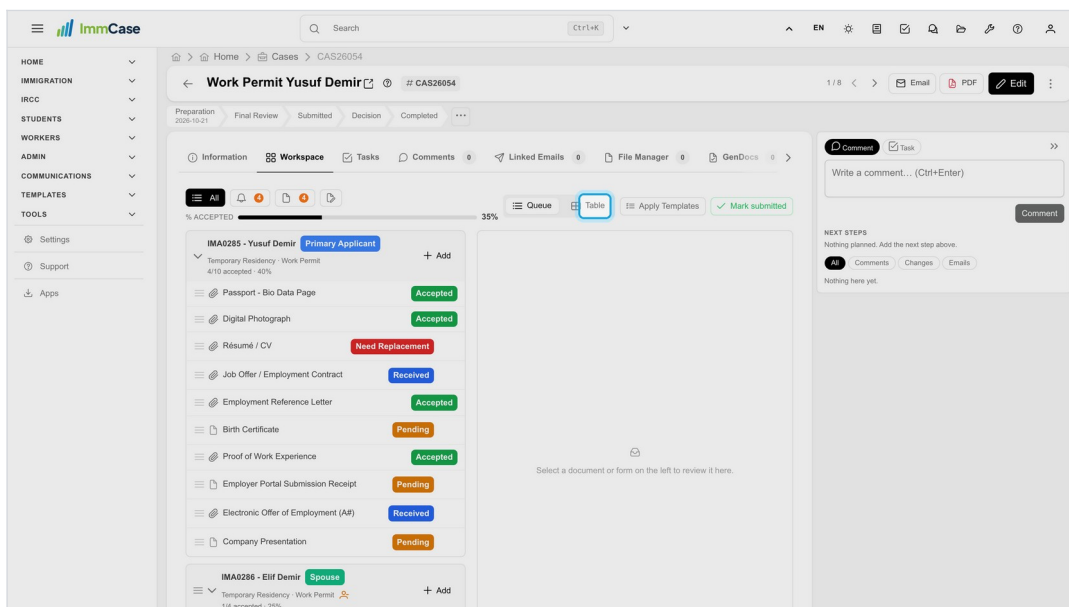
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A family's case can need dozens of documents. The **Table** view in the case's **Workspace** shows them like a spreadsheet: one row per person, one column per document, and the status of each in its cell. You can review a document or upload a new one without leaving the table.

The family («Yusuf, Elif and Can Demir») and the documents in this guide are **fictional**; every document is a specimen.

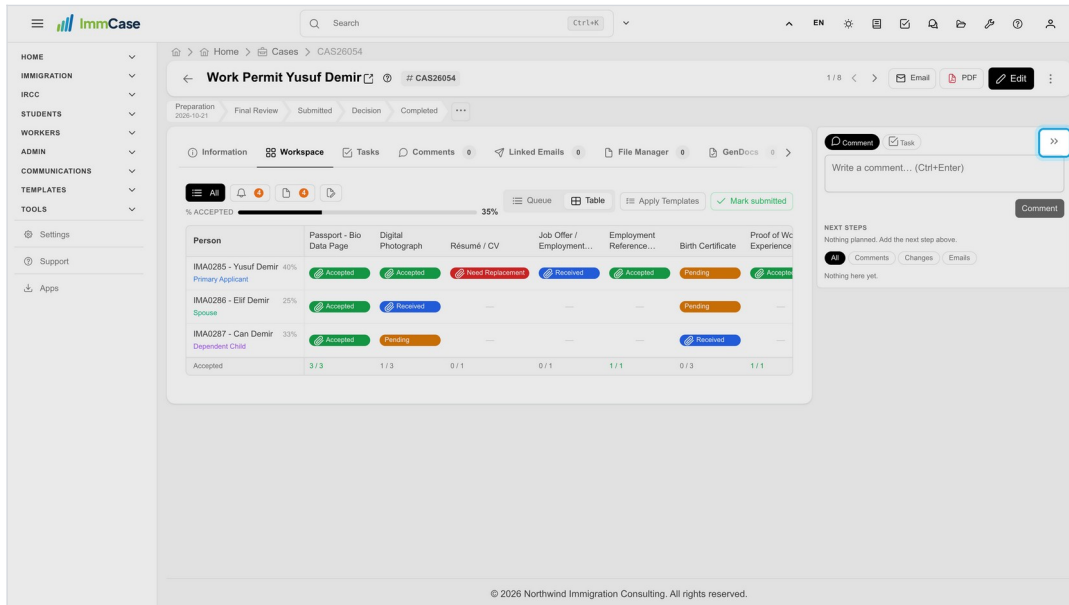
1. Switch to Table

Open the case, click the **Workspace** tab, then **Table** at the top right. ImmCase remembers your choice, so the next case opens in the table too.



2. Make room

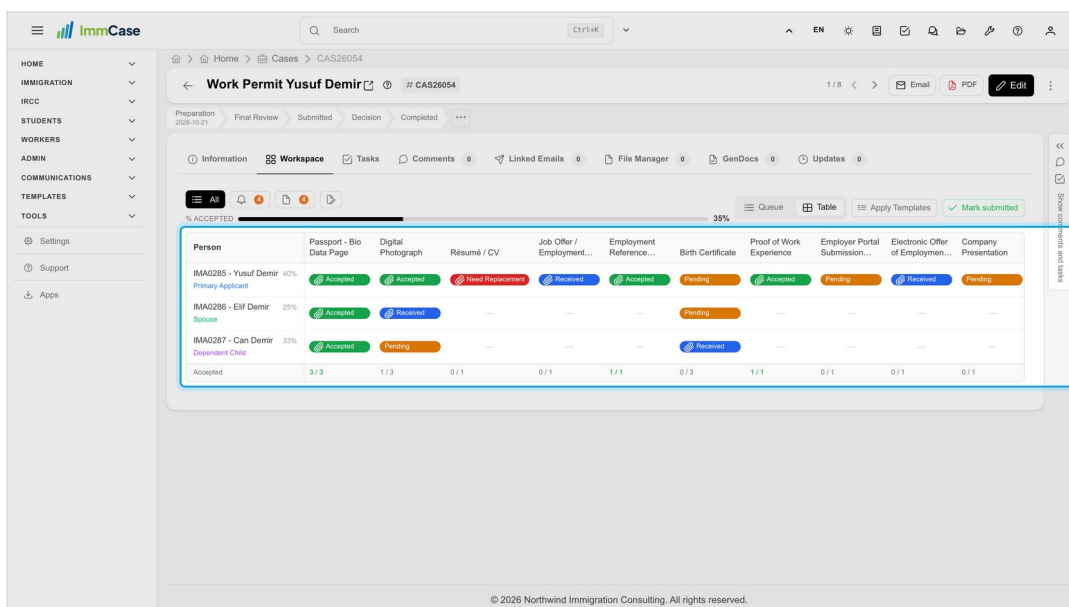
The comments and tasks panel takes the right side of the page. Click » at its top to fold it into a slim bar; click the bar to bring it back.



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3. Read the table

Each row is a person on the case and each column a document. **Green** is accepted, **blue** is received and waiting for you, **red** needs a replacement and **orange** is still missing. A **dash** means that document is not on that person's list. The last row counts what is accepted in each column.



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4. Review a document

Click a cell. The document opens in a panel on the right, while the table stays where it is.

The screenshot shows the ImmCase interface. On the left, a sidebar contains navigation links: HOME, IMMIGRATION, IRCC, STUDENTS, WORKERS, ADMIN, COMMUNICATIONS, TEMPLATES, and TOOLS. Below these are links for Settings, Support, and Apps. The main area displays a 'Work Permit Yusuf Demir' case with a progress bar showing stages: Preparation (2026-10-21), Final Review, Submitted, Decision, and Completed. Below the progress bar is a table with columns for document types and their status. The table has a header row: 'Person', 'Passport - Bio Data Page', 'Digital Photograph', 'Résumé / CV', 'Job Offer / Employment...', and 'Employment Reference...'. The table body contains three rows of data for different persons, with status indicators like 'Accepted', 'Received', and 'Need Replacement'. On the right, a document review panel is open, showing a 'Job Offer / Employment Contract' for 'specimen-job-offer.png'. The document content includes 'Harbourline Logistics Ltd. Offer of employment', 'To: Yusuf Demir', 'Position: Supply Chain Analyst (NOC 13201)', 'Location: Surrey, BC', 'Wage: CAD 34.50 per hour, 40 hours a week', 'Start date: 2027-01-11', and 'Signed: J. Okafor, Human Resources'. The panel also has a 'Download' button and an 'Edit image' button. At the bottom of the panel, there are buttons for 'Upload', 'Manage documents', 'Received', 'Need Replacement', 'Accept', and 'Next'.

Person	Passport - Bio Data Page	Digital Photograph	Résumé / CV	Job Offer / Employment...	Employment Reference...
IMAO285 - Yusuf Demir 40% Primary Applicant	Accepted	Accepted	Need Replacement	Received	Accepted
IMAO285 - Elf Demir 25% Spouse	Accepted	Received			
IMAO287 - Can Demir 33% Dependent Child	Accepted	Pending			
Accepted	3 / 3	1 / 3	0 / 1	0 / 1	1 / 1

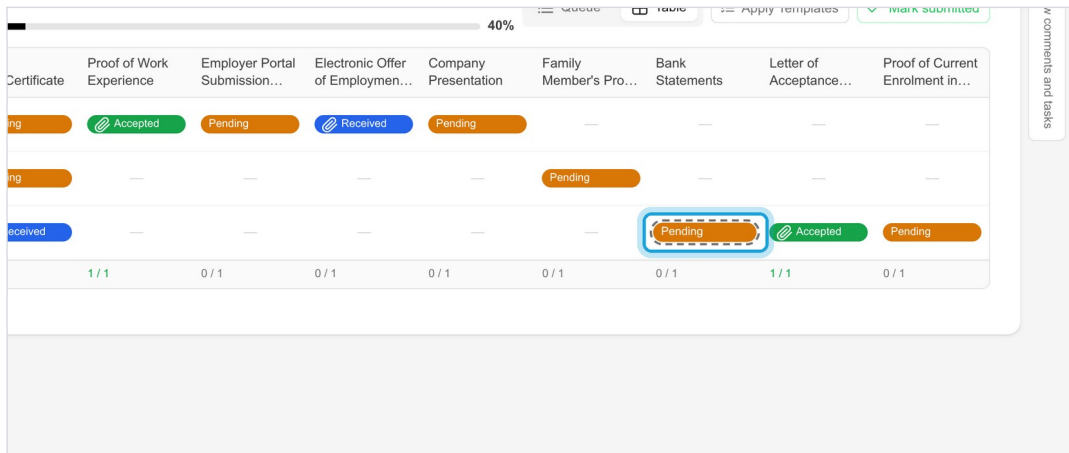
5. Accept it

Click **Accept** if it is right, or **Need Replacement** to ask the client again. The cell changes colour straight away.

This screenshot is a close-up of the document review panel from the previous image. It shows the document content: 'Wage: CAD 34.50 per hour, 40 hours a week', 'Start date: 2027-01-11', and 'Signed: J. Okafor, Human Resources'. At the bottom of the panel, the 'Accept' button is highlighted with a blue border, indicating it is the action to be taken. The 'Need Replacement' button is also visible. The 'Next' button is to the right of the 'Accept' button. The 'Upload' and 'Manage documents' buttons are to the left of the 'Accept' button. The 'Received' dropdown menu is also visible.

6. Drop a file on a cell

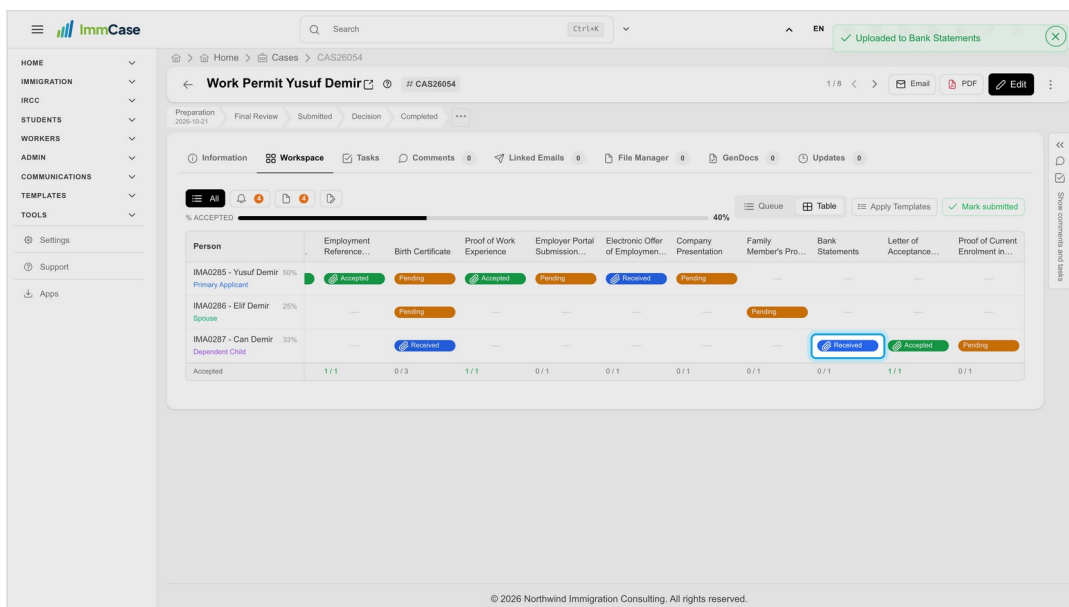
Got a document by email? Drag the file from your computer onto its cell. The cell is outlined while you hold it there.



Certificate	Proof of Work Experience	Employer Portal Submission...	Electronic Offer of Employmen...	Company Presentation	Family Member's Pro...	Bank Statements	Letter of Acceptance...	Proof of Current Enrolment in...
ing	Accepted	Pending	Received	Pending	—	—	—	—
ing	—	—	—	—	Pending	—	—	—
received	—	—	—	—	—	Pending	Accepted	Pending
1 / 1	0 / 1	0 / 1	0 / 1	0 / 1	0 / 1	0 / 1	1 / 1	0 / 1

7. Filed in the right place

The file is uploaded to that person's document and the cell turns **Received**, ready for you to review. It is also filed in the case's folders.



Work Permit Yusuf Demir # CAS26054

Preparation 2026-10-21 Final Review Submitted Decision Completed ...

Information Workspace Tasks Comments Linked Emails File Manager GenDocs Updates

% ACCEPTED 40%

Person	Employment Reference...	Birth Certificate	Proof of Work Experience	Employer Portal Submission...	Electronic Offer of Employmen...	Company Presentation	Family Member's Pro...	Bank Statements	Letter of Acceptance...	Proof of Current Enrolment in...
IMAO285 - Yusuf Demir 50% Primary Applicant	Accepted	Pending	Accepted	Pending	Received	Pending	—	—	—	—
IMAO286 - Elm Demir 25% Spouse	—	Pending	—	—	—	—	Pending	—	—	—
IMAO287 - Can Demir 33% Dependent Child	—	Received	—	—	—	—	—	Received	Accepted	Pending
Accepted	1 / 1	0 / 3	1 / 1	0 / 1	0 / 1	0 / 1	0 / 1	0 / 1	1 / 1	0 / 1

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Good to know

- **Filter the columns** with the buttons above the table: show only what still needs attention, or only the documents.
- **Back to the list view** any time with **Queue**; both show the same checklist.
- **Clients fill it too.** Documents a client sends through the portal land in the same cells as Received.

Questions: hello@immcase.com.