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Finessing Tech to Navigate Immigration Mazes

Technology helps law firms traverse laws, rules, forms and filings.

Jesse Londin , Law Technology News

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Hats off to the legal wranglers of the capaciously complex beast that is immigration law. The practice area features land mines of laws, rules, forms and filings. If anything demanded a techno-fix or two to help streamline processes, immigration practice was it.

Julie Pearl owns the quintessential URL—immigrationlaw.com—for her small, but mighty, 12-attorney, four-partner San Francisco-based Pearl Law Group. Not every firm website's "About Us" page boasts a separate menu tab, "Technology," to brag about the firm's own inventions. That's your first clue geeky lawyers rule here.

When Pearl cofounded her firm nearly 20 years ago with Alan Nelson, a former head of the Immigration and Naturalization Service (now the U.S. Citizenship and Immigration Services), the office's tech cred and mission began to take off.

"We soon got so busy in Silicon Valley that I knew we needed a technology [tool] to ensure that cases stayed on track and clients had real-time communication," Pearl recalled. "We developed a system in an Access database for our own use, but soon huge companies and other law firms knocked on our door and asked us to license it to them."

Called ImmigrationTracker (aka Tracker), it is now the signature software of her technology company, Tracker Corp. While Pearl doesn't code, she "project managed" the development of the immigration case management tool. It helped that her husband, Fred Colman, president of the company since its launch in 2001, is an accomplished engineer who holds more than a dozen high-tech patents.

ImmigrationTracker is a nifty case management product for business immigration practitioners who are in the market for a tool that "automates every phase of casework, allowing immigration firms and global mobility departments to realize higher efficiencies immediately," said Pearl. It streamlines data collection, forms processing, client communications and features customizable work flows and rich prebuilt content that enables immigration teams to "track and manage cases with a fraction of the effort that manual processes require."

All this automation leaves time for "focus on the important work that only humans can do, such as

reviewing the documents carefully and asking clients the questions they didn't know they needed to answer," said Pearl, whose clients include Electronic Arts Inc., Levi Strauss & Co., Salesforce.com Inc., Tesla Motors Inc. and Yelp Inc.

Pearl, who is chairwoman of Tracker, says she spends more time at her law firm than her company, which has a management team and full C-level suite running daily operations. Clients include in-house immigration departments in large companies in the entertainment, health care, retail and technology sectors, and corporate headhunters.

Over the years, Tracker Corp. has continued to build immigration technology products "to streamline processes and foolproof compliance," including Tracker I-9 Complete and Tracker I-9 Resolve for employment eligibility verification and E-Verify, Pearl noted.

Tracker synchs with the online systems of USCIS, the U.S. Department of Labor and the U.S. Department of State. Don't get her started on data security. "Our newest technology is architected as a SaaS—software as a service—system, with the highest level of security—critically important given the highly confidential data and personal information that are managed in the system. Data center operations are third-party audited, with an SSAE 16 Type 2 SOC 1 report available. Tracker supports Certificate Authority High Assurance Class 3 SSL certificates with support for 256-bit AES encryption and 2048-bit RSA key length. All data is encrypted in transit and at rest, with databases and backups encrypted using SQL server transparent data encryption—TDE," she confirmed.

Even a firm with home-crafted software relies on a basketful of outside tech tools for communication, collaboration, billing, payroll, finances and more. Hipchat, Trello, salesforce, QuickBooks Pro, Bill.com and a DNET SaaS platform by Centricity do the trick at Pearl's firm.

Ultimately, tech smarts are key to provide top-tier corporate immigration services and attracting the most sophisticated clients, she said. From global corporate immigration (Pearl Law Group's mainstay) to marriage-based green card cases, "no matter what type of work you're doing in our field, if you're filing cases within the increasingly electronic system of the USCIS and other countries, you're well served by using technology," Pearl said.

COMPETITORS

You won't find any disagreement from competitor Fragomen Worldwide. The business immigration law titan boasts 40 offices in 18 countries. It doesn't license ImmigrationTracker, it created its own propriety immigration-specific case management system.

"We use the system to track all case information and documents, and to set up automatic reminders of expiration dates and critical dates for visa and work authorization application processes," said partner Tina Peloquin. "Now we have systems that speak to each other and collect data that can populate forms," she added. "We have intricate reporting tools to track expiration dates, case type, filing deadlines, just about anything we need to monitor."

Staying "technologically advanced" is the firm's mandate. "It is a completely different world," said Peloquin, recalling old-school immigration practices. "A classic form that every immigration practitioner knows well is a G-325 form used to collect information about a person's personal history. I remember well the days of using a typewriter to complete this form with its carbon copies and carefully trying to avoid any errors! Long lists were used as reminders for expiration dates and other important case facts."

Getting everyone at the firm on board with the use of tech is key. Fragomen's regimen includes holding internal training sessions locally and rolling out training modules both nationally and internationally, said Peloquin.

Informed clients are a plus. "Something that attracted me to the practice of immigration law was working with clients who want to understand and be part of their immigration process."

Peloquin says the firm's focus on global mobility continues to drive the tech momentum. "We are one firm and we need the attorney in South Africa moving a family of U.S. permanent residents to be able to see an entire U.S. case history while planning for a move on that scale. As the world becomes flatter, our focus grows with demand while we serve a corporate client's full need on a universal level and not just country by country."

Fragomen doesn't rest on its tech laurels. "With technology, it is often tempting to implement a new application or launch a new product and then sit back while it quickly becomes out of date," she notes. "We constantly seek feedback and reevaluate our technology to avoid complacency."

Outside the office, business immigration firms naturally connect with tech company clients. New York TechDay 2014 in April attracted more than 400 tech startups to Manhattan's Pier 92. The organizers "approached law firms of all backgrounds and expertise types" offering sponsorships. The only two firms that stepped up to sponsor "happened to be immigration law firms," said spokeswoman Natalie Guevara. No big surprise.

Fragomen made sure it was one of the two. Across the floor, New York-based Barst Mukamal & Kleiner also worked the room, offering immigration services to young tech-sector entrepreneurs. The showcase was a "natural synergy for us because tech startups are often foreign owned or hiring foreign talent," said partner Alexis Axelrad.

OLD NEWS

While immigration firms know tech means business, some tech helps clients bypass law firms altogether. It's not news. Way back in 1998—the year Google launched and there were no such things as Facebook, Twitter or YouTube—VisaNow CEO Robert Meltzer, then chairman of the immigration group at a Chicago law firm, hit on a new idea for delivering immigration services online.

Given that immigration law practice "is basically data and document driven" and governed by a federal law, it's an "ideal candidate for delivering services using online technology," said Meltzer, who has no tech background—"just a desire to enhance the traditional way immigration legal services were being offered," he said.

"We were looking for a way to make the immigration process not so frustrating; in fact, we were looking to make it enjoyable," Meltzer recalled. Immigration and enjoyable in one breath? "To this day, that still remains our goal, to improve the legal services experience," he said. Today, with 15 attorneys, VisaNow's Web application services for individuals or businesses have processed more than 50,000 visa applications with an approval rate of more than 97 percent, he said.

Nowadays, companies angle to be the TurboTax of immigration filing, with startups such as BridgeUS and Clearpath serving the do-it-yourself consumer market. Clearpath, founded by the former head of USCIS Michael Petrucelli, offers individual filers a click-by-click process for finding the right immigration forms and completing them online. CEO Felice Gorordo acknowledges that

“attorneys do add value” in complicated cases; Clearpath refers complex cases to the American Immigration Lawyers Association.

Teleborder, launched last year to serve the medium-sized B2B market, delivers software for HR managers.

“Companies are spending six figures on immigration, bringing in ex-patriots and moving people around the world,” said CEO James Richards. “What our customers needed wasn’t necessarily better immigration lawyers. What they needed was better project management software,” he said. “What we built is a beautiful project management experience for immigration.”

Editor's note: Julie Pearl and J. Craig Williams, of The Williams Law Corp., will present "[Can Tech Save Fuel Small Firms](#)" at LegalTech West Coast at the Westin Bonaventure Hotel, on June 14, from 10:30 a.m.-11:45 a.m., as part of "The New Legal Ecosystem" track. For more information, contact www.legaltechshow.com.

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