

Best Immigration Software for Attorneys

Immigration law is more document-heavy, deadline-driven, and multilingual than most practice areas. General-purpose legal software can cover the basics — but the gaps show up fast. This guide breaks down the best software for immigration lawyers by category, with honest trade-offs for each.

Case Management

Client Intake

Document Collection

Billing

AI Automation

Immigration attorneys work under conditions that general-practice software was not built for: USCIS form mapping, RFE timelines, multilingual clients submitting documents across time zones, and visa categories that change their requirements year to year. A solo practitioner handling family-based cases has different needs than a corporate immigration team processing hundreds of H-1B petitions annually — but both share the same core problem: too much admin, not enough time for actual legal work.

This guide covers five software categories. Each one represents a distinct part of the workflow. The right stack is rarely a single platform — it is usually a primary case management system supplemented by a dedicated intake tool and, increasingly, an AI automation layer that connects them.

01

CATEGORY ONE

Case Management Software

Case management is the operational core of any immigration practice. It holds matters, contacts, documents, deadlines, and billing in one place. The three platforms that come up most often for immigration attorneys are Clio, MyCase, and Docketwise.

Docketwise

Immigration-specific

Built exclusively for immigration law. Smart questionnaires map client answers directly to USCIS forms, cutting the data-entry time that would otherwise fall on paralegals. Tracks filing deadlines per visa category and supports multi-step petition workflows for H-1B, family-based, asylum, and removal cases. The strongest choice if immigration is your primary or only practice area.

Best for: Dedicated immigration firms, solo immigration practitioners, practices with high petition volume.

Clio Manage

General-purpose

The most widely used legal practice management platform across all practice areas. Covers matters, contacts, documents, time tracking, and billing reliably. Its immigration-specific functionality is limited — no built-in visa type fields or USCIS deadline logic — but its ecosystem (integrations, templates, support) is the strongest in the market. Many immigration firms use Clio as their system of record and supplement it with Docketwise or an AI layer for the immigration-specific gaps.

Best for: Firms that handle immigration alongside other practice areas. Firms already invested in the Clio ecosystem.

MyCase

General-purpose

A full-featured practice management platform with a built-in client portal that immigration clients tend to find easier to navigate than Clio's. Strong on document sharing and client

communication. Like Clio, it is not immigration-specific, so visa-category workflows require manual setup. Billing and invoicing are handled natively. A reasonable alternative for smaller practices that want an all-in-one system without the Clio price point.

Best for: Small to mid-size immigration firms prioritizing client portal usability and cost.

Feature	Docketwise	Clio	MyCase
USCIS form mapping	✓	—	—
Visa deadline tracking	✓	Manual	Manual
Client portal	✓	✓	✓
Billing & invoicing	✓	✓	✓
Integration ecosystem	Limited	Extensive	Moderate

02 CATEGORY TWO Client Intake Software

Intake is where most immigration firms lose revenue without realizing it. A prospective client contacts the firm at 9pm. By Thursday morning, someone follows up. The client retained someone else Wednesday afternoon. Intake software exists to close that gap — automated responses, lead qualification, and CRM creation without staff involvement at the point of first contact.

Lawmatics

A legal CRM built specifically for law firms, with strong intake automation. When a lead fills out a form, Lawmatics creates a contact, triggers a follow-up sequence, and routes to the right attorney. Drip campaigns, e-signatures, and intake questionnaires are all built in. Immigration

firms use it primarily as the front-end lead management layer on top of Clio or Docketwise. The limitation is that the intake itself is still form-based — clients answer a fixed set of fields.

Best for: Firms with an established intake form workflow that want automated follow-up without rebuilding from scratch.

Clio Grow

Clio's intake and CRM module, designed to work hand-in-glove with Clio Manage. A lead captured in Clio Grow can be converted directly to a matter in Clio Manage with one click — no re-entry. E-signatures, online intake forms, and automated follow-up emails are included. The integration is tight and the learning curve is low for firms already on Clio. Less flexible than Lawmatics on complex automation sequences.

Best for: Firms already on Clio Manage that want intake without managing a separate CRM platform.

Smith.ai

A live virtual receptionist service with an AI-assisted intake layer. Real agents (plus AI) answer calls, screen leads, and capture basic intake information — useful for practices where phone calls are the primary contact channel. The human-in-the-loop model means it handles unusual situations better than pure automation. The cost model (per-conversation) can be high for high-volume practices.

Best for: Firms where most leads arrive by phone and want 24/7 live answering.

For a full comparison of intake approaches — including a live AI chatbot demo you can try right now — see [Client Intake Software for Law Firms](#).

03 Document Collection

Immigration cases are document-intensive by nature. Passport copies, tax returns, employment letters, birth certificates, marriage certificates — often in multiple languages and from multiple countries. Getting clients to submit complete, correct documents on time is one of the highest-friction parts of running an immigration practice.

Docketwise Questionnaires

The built-in questionnaire system collects structured data from clients and maps it to USCIS forms automatically. It also prompts clients to upload supporting documents at the right step. For practices using Docketwise, this is the most integrated document collection path available — no separate tool needed.

Clio's Client Portal

Clients can upload documents through the Clio portal, and attorneys can request specific files by name. The limitation is that there is no smart guidance — clients upload what they think is needed, which frequently means missing documents, wrong formats, or expired credentials. Someone on staff still has to review each submission and chase anything missing.

SharePoint / Google Drive

Some immigration firms use general-purpose cloud storage for document collection. It works, but it creates compliance risk (no audit trail, no access controls per matter), version confusion, and significant manual overhead organizing what clients send. It is not a recommended long-term solution for practices managing more than a handful of active cases.

The real bottleneck

Software can provide a place for clients to upload documents. What most platforms cannot do is proactively follow up when documents are missing, remind clients before deadlines, or notice that an uploaded passport is expired. That follow-up work falls on paralegals — unless you have

automated document-collection reminders running in the background. [See how automated case update workflows handle this →](#)

04 CATEGORY FOUR **Billing Software**

Immigration billing has a different shape than litigation billing. Flat fees per petition are common, which means time tracking is less critical but trust accounting and payment plans matter more. Clients often pay in installments tied to case milestones, and payment failures mid-case are a real operational problem.

Clio Billing (native)

Handles both hourly and flat-fee billing. Online payment via LawPay or Stripe. Trust accounting is built in and IOLTA-compliant. The tightest integration with Clio Manage means no re-entry — time entries, flat fees, and expenses bill through a single workflow. For firms already on Clio, there is no strong reason to use a separate billing tool.

LawPay

A payment processor built for law firms, with trust account compliance built in. LawPay integrates with Clio, MyCase, and Docketwise, and supports payment plans. For flat-fee immigration work, the ability to split a \$3,000 fee into three milestone payments without touching the trust account incorrectly is valuable. LawPay is the most common standalone payment layer for immigration practices.

For most immigration practices, billing is the least urgent software problem — the platforms above handle it adequately. The more expensive operational gaps are in intake and document collection, which is where time is actually lost before a case even opens.

05

CATEGORY FIVE

AI Automation for Immigration Law

Case management, intake, documents, and billing each solve one slice of the workflow. The gap between them — the handoffs, the follow-ups, the status updates — is where most of the admin time goes. An attorney shouldn't be triaging an inbox. A paralegal shouldn't be copying intake form data into a CRM. AI automation handles that connective tissue.

BEAMREACH AI

The automation layer that connects your stack

Beamreach builds AI agents specifically for immigration law firms. Instead of making your existing tools smarter in isolation, the agents work across your stack: they pick up where intake software stops and carry the case forward automatically.

AI Intake Conversations

Instead of a static form, the AI asks adaptive follow-up questions based on what the client says. It identifies visa category, flags complexity, pre-qualifies the lead, and creates a CRM record — all before a paralegal is involved.

Automated CRM Enrichment

Intake data — visa type, nationality, employer, timeline — is written directly into Clio or Lawmatics. Attorneys walk into consultations with complete records instead of partial notes.

Document Collection Reminders

Automated follow-up sequences chase missing documents so paralegals don't have to. Reminders escalate as deadlines approach without requiring manual oversight.

Client Status Updates

Clients receive proactive status notifications at case milestones — USCIS receipt, RFE issued, approval — without attorneys or paralegals drafting individual emails.

The result: intake handled overnight, CRM records complete before consultations, document follow-up running automatically, clients getting updates without staff involvement. What used to require an extra admin hire runs on its own.

[Book a Discovery Call](#)

[See the AI intake demo →](#)

What AI can and cannot do for immigration attorneys

AI handles well

- ✓ First-response to new inquiries (any time, any day)
- ✓ Intake question follow-up and lead qualification
- ✓ CRM record creation and enrichment
- ✓ Document collection reminders and escalation
- ✓ Case status notifications at defined milestones

AI does not replace

- ✗ Legal judgment on strategy or visa category selection
- ✗ Document review for legal accuracy or completeness
- ✗ RFE response drafting or legal argument development
- ✗ Client consultations or relationship management
- ✗ USCIS form review for correctness

Putting the stack together

Most immigration law firms land on a combination of three to four tools rather than one platform that does everything. Here is a reasonable baseline for a small to mid-size immigration practice:

Core

Docketwise or Clio Manage

Case management, matters, documents, deadlines, billing.

Intake

Lawmatics or Clio Grow

Lead capture, intake forms, automated follow-up sequences, e-signatures.

Payment

LawPay

Trust-compliant payments, flat-fee installment plans, online invoicing.

AI

Beamreach

AI intake conversations, CRM enrichment, document reminders, client updates — the automation layer that ties everything together.

[Talk to Beamreach about your stack →](#)

[Compare intake software in depth](#)

Frequently asked questions

What software do immigration lawyers use?

Most immigration law firms use a combination of tools: a case management system (Clio, MyCase, or Docketwise), a CRM for intake and lead follow-up (Lawmatics or Clio Grow), a document portal for collecting client files, and billing software. Increasingly, firms add an AI automation layer to handle intake responses, CRM enrichment, and client reminders automatically.

Is Clio good for immigration law?

Clio is a capable general-purpose case management platform used by many immigration practices. It handles matters, documents, time tracking, and billing well. Its main limitation is that it is not immigration-specific: it lacks built-in visa type fields, USCIS deadline tracking, and the document-heavy workflows immigration cases require. Many firms supplement Clio with Docketwise or with AI automation tools for the immigration-specific gaps.

What is Docketwise?

Docketwise is immigration-specific case management software. Its smart questionnaires map client answers directly to USCIS forms, reducing manual data entry. It also tracks filing deadlines and supports multi-step petition workflows for H-1B, family-based, asylum, and removal cases. It is purpose-built for immigration in a way that Clio and MyCase are not.

What is the best intake software for immigration law firms?

The best intake software depends on how much of the intake you want to automate. Lawmatics and Clio Grow are solid CRM-based options that automate follow-up sequences. For firms that want to go further — having AI ask adaptive questions, pre-qualify leads, collect documents, and create matter records without staff involvement — AI intake agents like Beamreach handle the entire intake conversation automatically.

Can AI replace paralegals at an immigration law firm?

No. AI can handle the repetitive, non-legal parts of a paralegal's job: intake data entry, CRM updates, document collection reminders, and client status notifications. What it cannot do is apply legal judgment, advise on strategy, or review documents for legal accuracy. The goal of AI automation is to free paralegals from administrative work so they focus on the case work that requires their expertise. See [the before-and-after productivity breakdown](#) →