IMMIGRATION LAW AUTOMATION

Immigration Client Intake Questionnaire: Template + Automation

Every immigration firm needs a way to collect the same core information from new clients — visa goals, nationality, employment history, prior immigration filings. This page gives you a working questionnaire structure and explains how to automate the entire process so that information flows directly into your CRM without anyone re-entering it.

What a good immigration intake questionnaire covers

The goal of an intake questionnaire isn't just to gather data — it's to gather the right data in a structured form that your team can act on immediately. A questionnaire that returns free-text paragraphs is only marginally better than a raw email. You need structured fields that map cleanly to your CRM.

The five sections below cover what most immigration practices need across employment-based, family-based, and asylum matters. Trim or extend based on your practice areas.

Section 1: Personal information

Full legal name

As it appears on passport or government ID

Date of birth

MM/DD/YYYY

Country of birth

Dropdown — determines visa retrogression eligibility

Country of citizenship

May differ from country of birth

Current country of residence

Determines consular processing vs. adjustment of status

Current immigration status (if in the US)

F-1, H-1B, B-2, EAD, green card, out of status, etc.

Status expiration date

I-94 expiry or visa stamp expiry

Passport expiration date

Flags cases where passport renewal may be needed

Section 2: Immigration goals

Primary immigration goal

Work authorization / green card / citizenship / family sponsorship / asylum / other

Visa category of interest (if known)

H-1B, O-1, EB-1, EB-2 NIW, L-1, family-based I-130, asylum, DACA renewal, etc.

Urgency level

No rush / within 6 months / urgent (status expiring, job offer contingent)

Have you consulted with another immigration attorney?

Yes / No — flags competitive situations and prior advice to consider

Section 3: Employment and education

This section is especially important for employment-based cases (H-1B, O-1, EB-1, EB-2 NIW) where the strength of the petition depends on the client's professional background.

Current employer

Name and location of current employer

Job title and role description

Used to assess specialty occupation eligibility for H-1B

Will the employer sponsor this petition?

Yes / No / Not yet decided — determines petition structure

Highest level of education

Degree type, field, country, and institution

US education?

Yes / No — foreign degrees may require credential evaluation

Professional licenses or certifications

Relevant for specialty occupation determinations

Published work, patents, or awards

Key for O-1 and EB-1 eligibility assessments

Years of experience in field

May substitute for degree requirements in some visa categories

Section 4: Immigration history

Prior filings, entries, and any immigration violations can significantly affect strategy and eligibility. This section flags issues before the consultation so the attorney walks in prepared.

Previous US visa applications

List visa types applied for and whether they were approved or denied

Prior US entries

Number of times entered, most recent entry date, and entry type

Any periods of unlawful presence in the US?

Yes / No — triggers bar analysis for reentry or adjustment

Prior deportation or removal orders?

Yes / No — requires full details if yes

Any criminal history?

Even minor convictions can affect admissibility — must be disclosed

Pending immigration petitions

I-130, I-140, or other pending cases — affects priority dates and strategy

Section 5: Family members

Dependents and US citizen or permanent resident relatives affect both eligibility and petition strategy. Collect this early to avoid surprises mid-case.

Marital status
Single / married / divorced — affects dependent inclusion

Spouse's citizenship / immigration status
US citizen spouse opens different petition pathways

Children under 21
Yes / No — dependents may be included on the same petition

US citizen or LPR relatives
Parents, siblings, or adult children who could serve as sponsors

Why the format matters as much as the questions

A PDF form emailed to clients produces documents that sit in inboxes. Someone still has to open the PDF, read it, and manually enter the data into your CRM. You've collected the information, but you haven't saved time — you've just moved the bottleneck.

A web questionnaire with structured fields solves part of this. But if the response arrives as a form submission email, someone is still copying fields into the CRM by hand.

The right approach connects the questionnaire directly to your CRM: submission triggers record creation, fields map automatically, and a confirmation goes to the client — all without a paralegal touching it. This is the gap that immigration intake automation fills.

Questionnaire vs. AI chatbot: when each makes sense

A structured questionnaire works best when the client arrives already knowing what they need — they've found your site searching for an H-1B attorney, they have a job offer, and they're ready to move forward. The form gets you the structured data you need without friction.

An AI chatbot works better for clients who are still exploring their options. They may not know whether they need an H-1B or an O-1, whether their employer needs to sponsor them, or whether their prior overstay creates a bar. A chatbot can ask follow-up questions, explain terms, and route them to the right visa category before collecting structured intake data.

Many practices benefit from both: the chatbot on ad landing pages and social traffic where intent is lower, the questionnaire on direct or referral traffic where the client already knows what they want. See a full comparison of intake methods →

Automating what happens after submission

The questionnaire is only step one. What happens next determines whether automation saves time or just creates a better-organized inbox problem:

- **CRM record creation:** submission data maps to structured fields in your case management system — no re-entry required.
- **Immediate confirmation to the client:** a personalized reply goes out within minutes, not hours. Includes next steps and what to expect from the firm.
- **Internal notification and triage:** the right team member gets alerted based on visa type, urgency, or case category — not a generic email blast to the whole office.
- **Scheduled consultation booking:** a Calendly or similar link goes to qualified leads automatically, reducing the back-and-forth of scheduling manually.
- **Follow-up sequence:** if the client doesn't book, an automated follow-up sequence runs for 7–14 days — without anyone tracking it manually. More on what paralegals can fully automate →

Common mistakes in immigration intake questionnaires

Asking for too much upfront

A 40-question form kills conversion. Prioritize the fields that triage the case and schedule the consult. Deep information gathering happens after the client engages.

Free-text fields where dropdowns would work

Free text for visa category, country, or urgency produces inconsistent data that can't be filtered in your CRM. Use dropdowns with an "Other / not sure" escape valve.

No mobile optimization

A large share of immigration inquiries come from mobile — particularly from clients in other time zones or who found you through social media. A form that doesn't work on a phone loses leads.

No immediate response

A client who submits a form and hears nothing for 48 hours assumes you're not responsive. The first automated reply — even a simple "we received your inquiry and will be in touch by tomorrow" — dramatically improves retention to consultation.

No CRM integration

If a paralegal has to manually move data from a form submission to the CRM, you've eliminated friction for the client but added it back on your end. The form and CRM need to be connected.

RELATED READING

→ **Clio AI Agents for Immigration Firms**

How intake questionnaire submissions flow automatically into Clio — document validation, matter creation, and follow-up without manual entry.

→ **3 Ways to Gather Initial Client Information**

Structured questionnaire, AI chatbot, and email capture — with live demos and trade-offs for each.

→ **Immigration Software for Paralegals: What's Worth Automating**

Beyond intake: what CRM enrichment, document reminders, and case enrichment automation look like in practice.

→ **Law Firm Intake Software: What Immigration Practices Actually Need**

How to evaluate intake tools — what matters, what doesn't, and why most off-the-shelf options fall short.

→ **Your Paralegal, With AI: The Real Productivity Difference**

A side-by-side table of response time, capacity, and coverage — the same paralegal, before and after automation.

First automation live in one week. No month-long discovery phases, no DIY configuration.

See what we automate

Book a free discovery call