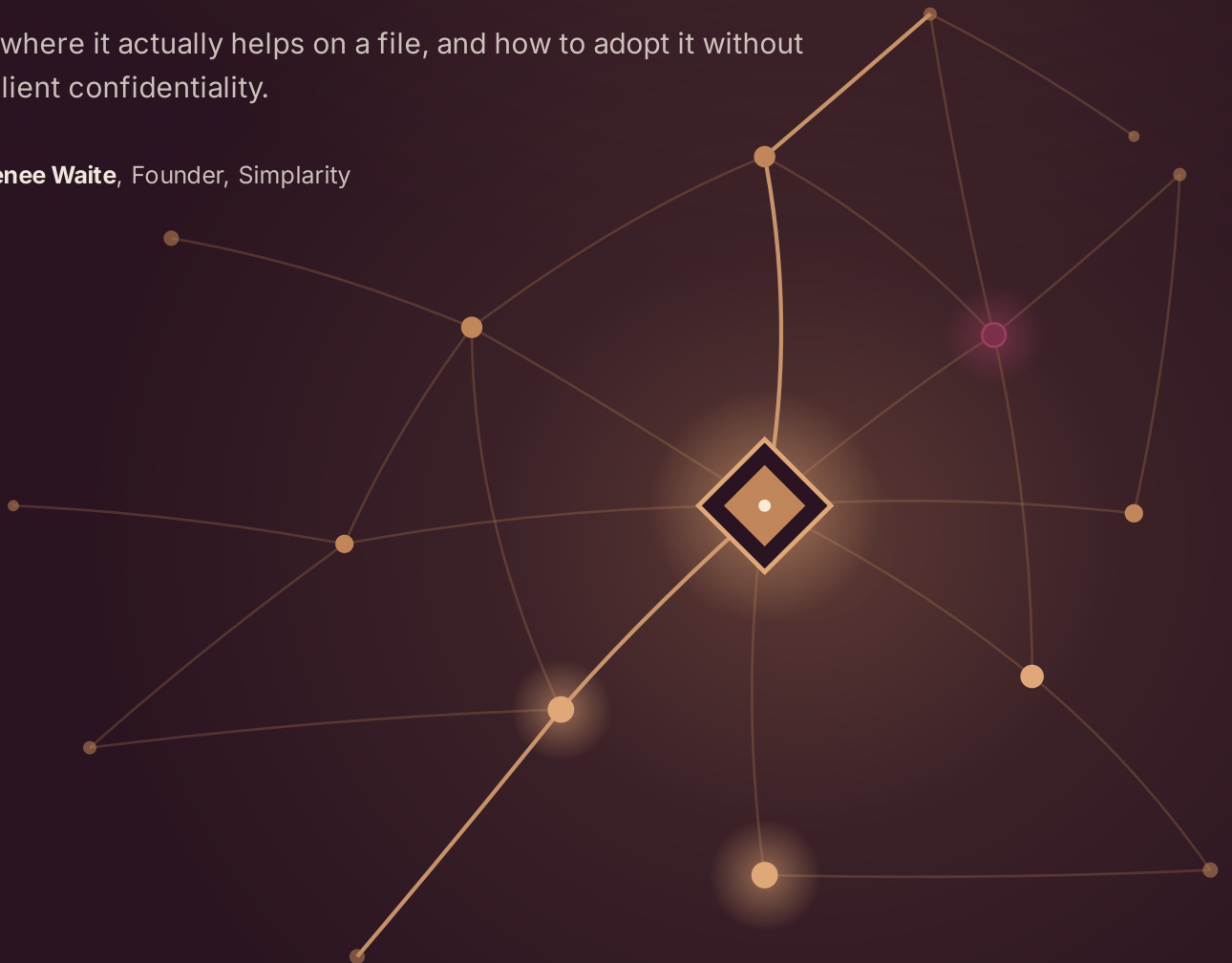


AI FOR IMMIGRATION PRACTICE

# Agentic AI for the *Immigration* Practice

What it is, where it actually helps on a file, and how to adopt it without breaking client confidentiality.

— By **Renee Waite**, Founder, Simplarity



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# Understanding agentic AI

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Immigration practice is a backlog business. More than 3.3 million cases sit pending before the immigration courts, and only about a third of the people facing a removal order had a lawyer when it came down.

The bottleneck is rarely your legal judgment. It is the volume of repeatable, document-heavy steps stacked around that judgment. The intake that has to be turned into a summary. The evidence list. The exhibit index. The status check. The deadline nobody saw.

Agentic AI is the layer that handles those steps. Not a chatbot that answers a question, but a system that can read a file, plan the work, use tools to complete it, and hand it back to you at every point that calls for a lawyer.

It does not replace you. It removes the parts of the file that never needed you in the first place.

## IN THIS EBOOK

- Where agentic AI fits in an immigration workflow, and where it does not
- A baseline to see where your firm sits today
- The use cases that pay off first, and what each one actually does
- The confidentiality controls that have to be in place before any of it touches a client file

Pending caseload and representation figures: TRAC Immigration, Syracuse University, March 2026.

# The maturity baseline

Before you adopt anything, find out where your firm actually sits. Most solo and small practices are further left than they think, usually because the AI in the building is on someone's personal account with nobody watching the door.

	EMERGING	DEVELOPING	MATURE
<b>Posture</b>	Curious. Ad hoc use on personal accounts.	A few sanctioned tools. An early policy.	AI mapped to named workflows, each with an owner.
<b>Where AI lives</b>	Public chatbots, no oversight.	Some firm-approved tools.	Vetted, contracted tools wired into case management.
<b>Confidentiality</b>	Client data pasted into public tools.	Training opt-outs set. A DPA on the main tools.	No-training contracts, ZDR where warranted, a BAA where a matter touches medical records.
<b>Staff skills</b>	One or two power users.	The team works from a shared prompt library.	Firm-wide fluency and a named AI lead.
<b>Integration</b>	Occasional manual copy and paste.	A few steps automated.	Agents run defined workflows with human sign-off.
<b>Oversight</b>	Whatever the user remembers to check.	Spot checks.	Every output reviewed against a checklist before it is filed or sent.

There is no prize for jumping straight to **Mature**. The prize is moving one column to the right **with the confidentiality controls already in place.**

# Generative AI, agents, and agentic AI

People use these three names as if they mean the same thing. They do not, and the difference decides what you can safely hand off.

## Generative AI

### Drafts a first pass.

Produces or rewrites text from what you give it. It writes. It does not act.

**In a firm:** drafts a cover letter or a declaration outline from your notes.

## AI Agents

### Completes one task.

Finishes a single defined job end to end, using tools to get there.

**In a firm:** pulls the evidence list for an I-130, checks what is missing, builds the exhibit index.

## Agentic AI

### Coordinates the work.

Runs several steps and tools toward a goal, with you signing off at the decisions.

**In a firm:** runs intake, flags the likely case type, drafts the response shell, tracks the deadline.

Read left to right, each one does more on its own. **And each one needs a tighter confidentiality contract**, because more autonomy means more of your client's file moving through the tool.

# What an agent does on a file

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Stripped of the marketing, here is the actual sequence an agent runs on a matter.

- Reads the intake and identifies the likely benefit and the red flags
- Pulls the evidence checklist for the form type and marks what is missing
- Breaks a complex filing into ordered, trackable steps
- Drafts the repeatable documents and routes them to you
- Watches the case status and the deadline, and tells you when something changes
- Hands the file back to a human at every point that calls for legal judgment

Notice what is **not** on the list. It does not decide the case. It does not give legal advice. It does not sign anything. That stays with you, and that is the point.

# The adoption path

You do not arrive at agentic AI. You climb to it. Three stages, in order, each earning the next.

1

**ASSIST**

**You drive.**

The tool drafts inside a vetted, no-training environment. Lowest risk, and you feel the time come back the first week.

2

**DELEGATE**

**It completes tasks.**

Agents finish defined jobs, evidence lists, exhibit indexes, status checks, and route them to you for review.

3

**ORCHESTRATE**

**It runs the workflow.**

Agents carry a matter from intake to draft to deadline, with your sign-off at every legal decision.

Most firms should start at **Assist** and earn their way up. Jumping to orchestration before the confidentiality controls exist is how client data ends up training a public model.

# Where it helps an immigration practice

These are the workflows that pay off first in an immigration firm. Start at the top.

<b>Intake and screening</b> EVERY CASE TYPE	Turns a messy intake into a structured summary. Flags the likely case type and the facts that are still missing.
<b>Evidence collection</b> FAMILY, ASYLUM, E-2	Builds the checklist by form type. Tracks what the client sent. Chases what is still outstanding.
<b>Document assembly</b> FILINGS AND PACKETS	Drafts cover letters, exhibit indexes, form shells, and declaration outlines from your notes.
<b>RFE and NOID response</b> ADJUDICATIONS	Reads the notice. Maps each request to the evidence on hand. Drafts the response shell for your edit.
<b>Status and docket monitoring</b> USCIS AND EOIR	Watches case status and court dates. Surfaces changes and deadlines before they become emergencies.
<b>Country conditions</b> ASYLUM AND WITHHOLDING	Gathers and organizes current country conditions, with sources, for you to read and verify.
<b>Client communication</b> ALL MATTERS	Drafts status updates and reminders in the client's language, sent only on your approval.
<b>Translation triage</b> EVIDENCE AND RECORDS	Produces a first-pass translation of client documents for review by a certified translator.

Every row ends at the same place: you. The agent assembles. The judgment, the advice, and the signature stay with the lawyer.

# What it looks like on a real file

Three places it earns its keep in a week. These are illustrative, not client matters.

## INTAKE

### The 2 a.m. declaration

An intake lands at midnight. By morning the agent has turned it into a structured declaration outline, facts in order, gaps flagged. You write the voice and the law. The night is yours again.

## RFE

### The day-long response

The RFE arrives. The agent reads it, maps each request to evidence already in the file, and drafts the response shell. You edit, you cite, you file. An afternoon, not a day.

## DOCKET

### The change nobody saw

A master calendar date moves. The monitor catches it the day it posts and tells you, instead of you learning it the week of. You respond in time.

None of these is the lawyer being replaced. Each one is the lawyer getting back the hours that were never legal work to begin with.

# Buy, build, and adopt

Two paths for a solo or small firm. Most should start by buying and adopt building later, once the workflows are proven.

## BUY AND ADOPT

Start with vetted tools that already do the hard part. Pick ones that commit, in writing, to no training and offer a DPA. Wire them into intake and document assembly first. This is the fastest path and the lowest risk for a small firm.

## BUILD AND CUSTOMIZE

Connect an agent to your own templates, checklists, and case management. More control over how the work gets done, and a closer fit to how your firm actually files. It needs a confidentiality review and one person who owns it.

## A NOTE FOR THE BIGGER FIRMS

Larger practices can build on enterprise AI platforms and open agent frameworks, with model choice, session isolation, and audit logging. The principles in this guide do not change. The contracts just get longer, and the review gets more formal.

# The confidentiality guardrails

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None of the value in this guide is worth a bar complaint. Before any agent touches a client file, all five of these have to be true.

- **No training on your inputs**, in writing, on every seat your firm uses.
- **A signed DPA**. A BAA only where a matter involves medical records.
- **Zero Data Retention** where the client or the matter warrants it.
- **A human signs off** on every output before it reaches a client or a filing.
- **A written AI policy**, and ABA Formal Opinion 512 read and kept in the file.

Agentic AI gives a small firm the capacity of a much larger one. **Without these controls, it is a confidentiality incident waiting for a docket number.**

Reference: ABA Standing Committee on Ethics and Professional Responsibility, Formal Opinion 512, Generative Artificial Intelligence Tools, issued July 2024.

## WHERE TO START

# Demand is not your problem. *Capacity is.*

The backlog is not getting smaller. More than 3.3 million cases sit pending, and most of the people in them have no lawyer. Agentic AI is how a small firm answers that without hiring its way out.

The firms that adopt it with guardrails get their evenings back. The ones that paste client files into a public chatbot get a bar complaint. Simplarity helps you build the first kind.

[Book a Simplarity efficiency audit](#)

One audit. Your whole workflow, mapped to where agentic AI pays off first, with the confidentiality controls built in.

*Systems that simplify. Results that last.*