

BOTELHO IMMIGRATION COURSES

The Marriage Green Card System

DISCRETIONARY EQUITIES CHECKLIST

*A complete evidence-gathering worksheet for marriage-based green card applicants
preparing an adjustment of status case under USCIS Policy Memorandum PM-602-0199*

2026 Update

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How to Use This Checklist

This checklist is your evidence-gathering inventory for a marriage-based green card application in light of USCIS Policy Memorandum PM-602-0199, issued May 21, 2026. The memo does not change the law. What it does is remind officers that adjustment of status under INA §245(a) is — as the courts have long held — a matter of "discretion and administrative grace," and an "extraordinary" form of relief that lets a person obtain a green card from inside the United States instead of going through the ordinary immigrant visa process at a consulate abroad. The practical effect is that meeting the basic eligibility requirements is no longer the end of the inquiry: the officer also weighs the positive and negative factors in your case, under the totality of the circumstances, and decides whether granting permanent residence is in the best interests of the United States.

Eligibility alone is no longer enough. You should affirmatively document the positive equities that support a favorable exercise of discretion in your case. This checklist organizes that evidence into seven working categories. Those seven categories are this course's framework for making sure every factor the memo asks officers to weigh is covered; they are not labels taken from the memo itself. The memo directs officers to consider family ties, your immigration status and history, your moral character, and any other relevant factor, citing the long-standing balancing test from *Matter of Mendez-Morales* and *Matter of Marin*. Our seven categories simply make that balancing concrete and thorough.

What the memo actually says — in plain terms

- Adjustment is discretionary "administrative grace," not an entitlement. The burden is on you to show you deserve a favorable exercise of discretion.
- The officer weighs ALL positive and negative factors together (the "totality of the circumstances"). The absence of negative factors, by itself, is not enough — you must put real positive equities on the scale.
- Certain facts weigh against you: failing to maintain status or the conditions of your parole, and — especially — failing to depart when your authorized stay ended, when you could have pursued an immigrant visa abroad instead.
- Where you have such adverse factors, the governing case law (*Matter of Blas*) says you may need to offset them with "unusual or even outstanding equities." That is the real standard — and it is why this checklist exists.

A protection the memo builds in

If an officer denies your case as a matter of discretion, the memo requires the written denial to identify the positive and negative factors the officer considered and explain why the negatives outweighed the positives. A discretionary denial cannot be a bare "denied." That written analysis gives you — and your attorney — a specific, reasoned target to respond to.

Recommended workflow

1. Print this checklist or open it in your preferred PDF reader.
2. Work through one category per week. Do not try to gather everything in one sitting — the documents that take the longest to arrive (FBI background check, IRS transcripts, country conditions reports) should be requested early.
3. Check each box as you obtain each item. Note the date you received it in the right margin or in a separate tracking sheet.
4. Store gathered documents in a single binder or folder organized by category, with a divider for each of the seven categories below.
5. When all categories are complete, use the materials to draft your sworn Discretionary Statement using the companion template, also available at immigration-courses.com/updates.
6. File the Discretionary Statement and all supporting exhibits as part of your I-485 package, organized in the order specified in your course materials.

Important: this is educational material, not legal advice.

This material provides general legal education for students of The Marriage Green Card System course. It does not create an attorney-client relationship with Botelho Law Group PLLC or any other attorney. USCIS policy, regulations, and adjudication practices change over time — verify current requirements before filing. For advice specific to your situation, schedule a free consultation with Botelho Law Group at 508-500-1551 or us-immigration-lawfirm.com/free-consultation/. Botelho Immigration Courses is offered by Botelho Financial Group LLC and is a separate entity from Botelho Law Group PLLC.

First: Confirm the Memo Even Applies to You

Before gathering equities evidence, confirm that your adjustment category is actually discretionary. A limited set of adjustment provisions are NOT discretionary at all — if you qualify under one of them, USCIS must approve your case once you meet the eligibility requirements, and this memo does not change your path.

Non-discretionary adjustment categories (the memo does not apply)

If you are adjusting under any of the following, the discretionary analysis in PM-602-0199 generally does not apply to you:

- Refugee or asylee adjustment under INA §209;
- The Cuban Adjustment Act;
- NACARA (certain Nicaraguans, Cubans, and others);
- The Liberian Refugee Immigration Fairness (LRIF) provisions.

Most marriage-based applicants adjust under INA §245(a), which IS discretionary — so this checklist applies to you. If you are unsure which provision governs your case, confirm it before relying on this checklist.

A note for spouses of U.S. citizens

If you are the spouse (or parent, or unmarried minor child) of a U.S. citizen — an "immediate relative" — you are forgiven certain bars under INA §245(c) that would otherwise block eligibility, such as an overstay or a period of unauthorized work. That forgiveness goes to eligibility. It does not erase the overstay as a discretionary factor: the officer may still weigh it. That is exactly why documenting your positive equities matters.

CATEGORY 1 — FAMILY TIES

Document, in detail, your embedded position in a U.S. family unit. Family ties are one of the factors the memo expressly directs officers to weigh, and they are among the strongest positive equities in the totality-of-the-circumstances analysis. The more thoroughly you document your family ties, the more weight you place on the positive side of the scale.

U.S. Citizen or Lawful Permanent Resident Spouse

<input type="checkbox"/>	Marriage certificate (certified copy from the issuing jurisdiction)
<input type="checkbox"/>	Spouse's birth certificate, naturalization certificate, or U.S. passport (proving U.S. citizenship or LPR status)
<input type="checkbox"/>	Joint federal and state tax returns for all years available since marriage
<input type="checkbox"/>	Joint bank account statements (checking, savings) for at least 12 months
<input type="checkbox"/>	Joint credit card statements showing shared spending
<input type="checkbox"/>	Joint lease or mortgage documents
<input type="checkbox"/>	Joint utility bills (electric, gas, water, internet) in both names
<input type="checkbox"/>	Joint health, auto, life, or homeowners insurance policies
<input type="checkbox"/>	Beneficiary designations naming spouse (401(k), life insurance, will, etc.)
<input type="checkbox"/>	Photos together across time — engagement, wedding, holidays, daily life
<input type="checkbox"/>	Travel records together (boarding passes, hotel reservations, vacation photos)
<input type="checkbox"/>	Communication records before marriage (texts, emails, social media) where available
<input type="checkbox"/>	Wedding documentation (invitations, vendor receipts, guest list, photos)
<input type="checkbox"/>	Letters from family and friends attesting to the bona fides of the marriage

U.S. Citizen or LPR Children

<input type="checkbox"/>	Birth certificates for each U.S. citizen or LPR child
<input type="checkbox"/>	School enrollment records, report cards, attendance records
<input type="checkbox"/>	Medical records, immunization records, pediatrician contact information
<input type="checkbox"/>	Photos with each child across time
<input type="checkbox"/>	Documentation of your role in daily caregiving (school pickup, doctor visits, extracurriculars)
<input type="checkbox"/>	Records of school events you attend (parent-teacher conferences, performances, sports)
<input type="checkbox"/>	Letters from teachers, coaches, or pediatricians describing your involvement

U.S. Citizen or LPR Parents or Other Dependent Relatives

<input type="checkbox"/>	Proof of relationship (birth certificates establishing parentage)
<input type="checkbox"/>	Proof of relative's U.S. citizenship or LPR status
<input type="checkbox"/>	Medical records demonstrating the relative's dependence on caregiving
<input type="checkbox"/>	Financial records showing the financial support you provide to the relative
<input type="checkbox"/>	Caregiving documentation (medication schedules, doctor appointment records, in-home care logs)
<input type="checkbox"/>	Letters from physicians, social workers, or other care providers describing your caregiving role

Step-Family Relationships (if applicable)

<input type="checkbox"/>	Proof of relationship (marriage certificate plus stepchild's birth certificate)
<input type="checkbox"/>	Photos and documentation of your role in stepchild's life
<input type="checkbox"/>	School records showing you as an emergency contact or parental figure
<input type="checkbox"/>	Letters from teachers, pediatricians, or counselors describing your involvement
<input type="checkbox"/>	Records of financial support you provide for stepchildren

CATEGORY 2 — FAMILY IMPACT AND HUMANE CONSIDERATIONS

One of the most important categories. Document the real human stakes of your case for your U.S. citizen or lawful permanent resident family members — and your role in their lives. The memo directs officers to weigh the "social and humane considerations" in your case against any adverse factors. Strong, specific documentation of those considerations is central to a favorable discretionary decision.

A note on framing — read this before you gather

The memo does NOT impose a formal "hardship" test, and it does not use the qualifying-relative hardship framework that applies to waivers (such as the I-601/I-601A "extreme hardship" standard). Do not try to force your facts into a hardship-to-qualifying-relatives mold.

What the memo asks for is the human picture: who depends on you, what role you play in your family, and what the genuine consequences would be if you were not here. Frame the material around the real-world impact on your U.S. citizen and LPR family members and the humane considerations in your case — not around legal hardship labels, and not solely around inconvenience to yourself. Specific facts (names, conditions, who relies on you for what) carry far more weight than general statements.

Medical Needs in the U.S. Family

<input type="checkbox"/>	Letters from treating physicians describing each U.S. family member's medical conditions
<input type="checkbox"/>	Treatment plans showing ongoing care that depends on your presence or would be disrupted by relocation
<input type="checkbox"/>	Documentation that comparable medical care is not available in your home country at the same standard
<input type="checkbox"/>	Records showing a U.S. family member's reliance on you for transportation, scheduling, or in-home caregiving
<input type="checkbox"/>	Prescription records and pharmacy documentation where caregiving is part of the medical regimen
<input type="checkbox"/>	Psychological evaluations where mental-health impact is a factor

Impact on U.S. Citizen / LPR Children

<input type="checkbox"/>	Current school enrollment and academic records for each child
<input type="checkbox"/>	IEPs, 504 plans, or other special education documentation if applicable

<input type="checkbox"/>	Letters from school counselors or teachers describing the disruption a family upheaval would cause
<input type="checkbox"/>	Records of extracurricular commitments, scholarships, or college planning that depend on stability
<input type="checkbox"/>	Documentation of your specific role in each child's education and development

Financial Role in the U.S. Household

<input type="checkbox"/>	Documentation of your income contribution to the U.S. household
<input type="checkbox"/>	Records showing the spouse's inability to maintain the household income alone
<input type="checkbox"/>	Mortgage, rent, and ongoing debt obligations that depend on your income
<input type="checkbox"/>	Childcare arrangements that depend on your presence (and the cost of replacing them)
<input type="checkbox"/>	Business ownership or self-employment records if you operate a family business
<input type="checkbox"/>	Records of any U.S. family member who is unable to work and depends on your earnings

Caregiving Role

<input type="checkbox"/>	Documentation of caregiving role for elderly or disabled U.S. citizen or LPR relatives
<input type="checkbox"/>	Records showing absence of alternative caregivers in the family unit
<input type="checkbox"/>	Cost estimates for replacement professional caregiving
<input type="checkbox"/>	Letters from physicians or care coordinators describing the necessity of your caregiving role

Country Conditions (if applicable)

<input type="checkbox"/>	U.S. State Department Country Reports for your country of origin (current year)
<input type="checkbox"/>	U.S. State Department travel advisories for your country
<input type="checkbox"/>	Reports from established human rights organizations (Amnesty International, Human Rights Watch, etc.)
<input type="checkbox"/>	Documentation of specific safety concerns, political instability, or violence affecting your region
<input type="checkbox"/>	Documentation of inadequate medical care, infrastructure, or services that would affect your U.S. family if they relocated

Sworn Declarations from U.S. Family Members

<input type="checkbox"/>	Sworn declaration from your U.S. citizen or LPR spouse describing the family circumstances in detail
<input type="checkbox"/>	Sworn declarations from adult U.S. citizen or LPR children where applicable
<input type="checkbox"/>	Sworn declarations from dependent parents or other U.S. relatives where applicable
<input type="checkbox"/>	All declarations notarized and signed under penalty of perjury

CATEGORY 3 — MORAL CHARACTER EVIDENCE

The memo lists the applicant's moral character as a factor officers must weigh. Treat moral character as an affirmative element of your case — evidence that you are an actively good person whose presence in the United States benefits your community — not merely the absence of bad acts.

Specificity is credibility.

Generic letters that say "Joseph is a wonderful person" are worth almost nothing. Letters with specific, dated, concrete examples are worth a great deal. When you request letters, give each writer a one-page guidance sheet asking for two or three specific concrete examples from their experience with you.

Character Reference Letters

<input type="checkbox"/>	Letter from current employer (signed, on company letterhead, with contact information)
<input type="checkbox"/>	Letters from previous employers covering the relevant time period
<input type="checkbox"/>	Letters from clergy or religious community leaders who know you personally
<input type="checkbox"/>	Letters from community leaders (civic association presidents, board members, etc.)
<input type="checkbox"/>	Letters from neighbors describing your character and conduct
<input type="checkbox"/>	Letters from longtime friends with specific examples of your character
<input type="checkbox"/>	Letters from teachers, coaches, mentors who have known you over time
<input type="checkbox"/>	Letters from professional colleagues describing your reputation and work

Volunteer and Community Service

<input type="checkbox"/>	Volunteer time logs with dates, organization names, and supervisor contact information
<input type="checkbox"/>	Letters from volunteer coordinators describing your specific contributions
<input type="checkbox"/>	Awards, recognitions, or certificates from volunteer organizations
<input type="checkbox"/>	Photos documenting your participation in community service activities
<input type="checkbox"/>	Records of recurring volunteer commitments (weekly, monthly)

Charitable Contributions

<input type="checkbox"/>	Records of charitable donations (receipts, tax records, recurring donation confirmations)
<input type="checkbox"/>	Documentation of in-kind contributions

<input type="checkbox"/>	Membership in charitable organizations or causes
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Religious and Civic Engagement

<input type="checkbox"/>	Records of religious community membership and participation
<input type="checkbox"/>	Documentation of leadership or service roles in religious community
<input type="checkbox"/>	Records of civic engagement (voting registration if eligible, civic association membership, community board service)
<input type="checkbox"/>	Documentation of mentorship roles (coaching youth sports, mentoring programs, tutoring)

CATEGORY 4 — TAX AND LEGAL COMPLIANCE

A clean, complete tax and legal compliance record is one of the clearest positive equities you can present, and compliance with the law bears directly on the character and totality analysis the memo describes. Unresolved compliance issues can taint the credibility of your entire package.

Resolve any open issues before filing.

If you have unfiled tax years, file them now. If you have unresolved state tax issues, resolve them now. If you have unpaid traffic citations or civil judgments, pay them now. Do not file your I-485 with open compliance issues — they become discretionary problems.

Federal Tax Compliance

<input type="checkbox"/>	IRS tax transcripts for the most recent 3 to 5 years (request via Form 4506-T or IRS.gov — free)
<input type="checkbox"/>	Joint tax returns where filing jointly with spouse
<input type="checkbox"/>	Evidence that all required federal returns have been filed
<input type="checkbox"/>	Evidence of payment plans for any outstanding federal tax liability (if applicable)

State Tax Compliance

<input type="checkbox"/>	State tax returns or transcripts for the most recent 3 to 5 years
<input type="checkbox"/>	Evidence that all required state returns have been filed
<input type="checkbox"/>	Documentation of any state tax issue resolution

Criminal Record Documentation

<input type="checkbox"/>	FBI Identity History Summary (request at edo.cjis.gov — takes approximately 3 weeks)
<input type="checkbox"/>	Certified court dispositions for any arrest in your history, even if charges were dropped or dismissed
<input type="checkbox"/>	Certified court dispositions for any conviction, including misdemeanors and traffic offenses involving court appearance
<input type="checkbox"/>	State background checks where you have lived (some states require this in addition to the FBI check)
<input type="checkbox"/>	Evidence of completed sentence, probation, or other court-imposed obligations (if applicable)
<input type="checkbox"/>	Letters of rehabilitation from probation officers, treatment providers, or community supervisors (if applicable)

Driving and Civil Compliance

<input type="checkbox"/>	Current valid driver's license (state-issued)
<input type="checkbox"/>	Clean driving record from your state DMV (or evidence of resolved citations)
<input type="checkbox"/>	Documentation of any resolved civil judgments or small-claims matters

CATEGORY 5 — COMMUNITY AND PROFESSIONAL CONTRIBUTIONS

Document what you have built and contributed during your time in the United States. This is your professional and civic résumé tailored for the discretionary analysis — evidence that you are not just present in the United States but actively contributing to it, which bears on whether your permanent residence is in the best interests of the country.

Employment Records

<input type="checkbox"/>	Current employer letter on company letterhead describing role, tenure, salary, contributions, and value to the employer
<input type="checkbox"/>	Pay stubs from current employment (most recent 6 months)
<input type="checkbox"/>	W-2 forms for all years of U.S. employment
<input type="checkbox"/>	Letters from previous employers describing role and contributions
<input type="checkbox"/>	Resume or CV current as of filing date
<input type="checkbox"/>	Promotion records, salary progression, performance reviews
<input type="checkbox"/>	Employment-related awards or recognitions

Professional Credentials

<input type="checkbox"/>	Professional licenses (medical, legal, engineering, real estate, cosmetology, etc.)
<input type="checkbox"/>	Industry certifications and continuing education records
<input type="checkbox"/>	Advanced degrees from U.S. or foreign institutions (with evaluation if foreign)
<input type="checkbox"/>	Membership in professional associations
<input type="checkbox"/>	Professional publications, presentations, or contributions to your field

Business Ownership (if applicable)

<input type="checkbox"/>	Business formation documents (articles of incorporation, LLC certificate, etc.)
<input type="checkbox"/>	Business tax returns for the past 3 years
<input type="checkbox"/>	Employee count and payroll records
<input type="checkbox"/>	Documentation of business contracts, clients, or notable achievements
<input type="checkbox"/>	Evidence of jobs created or sustained by your business

Economic Contributions

<input type="checkbox"/>	Home ownership documents (deed, mortgage statements, property tax records)
<input type="checkbox"/>	Records of tax contributions to local, state, and federal government over time
<input type="checkbox"/>	Investment in U.S. retirement accounts (401(k), IRA, etc.)
<input type="checkbox"/>	Documentation of significant purchases that contribute to the U.S. economy

Civic and Educational Contributions

<input type="checkbox"/>	Records of school PTA or board service
<input type="checkbox"/>	Records of nonprofit board service
<input type="checkbox"/>	Records of mentorship, tutoring, or teaching roles
<input type="checkbox"/>	Records of youth sports coaching or community recreation involvement
<input type="checkbox"/>	Records of civic association membership and leadership

CATEGORY 6 — HONEST TREATMENT OF ADVERSE FACTS

This category applies only if you have adverse facts in your immigration history — overstays, unauthorized work periods, prior denials, status lapses, or other negative facts. If your record is fully clean, you may skip this category. If you have any adverse facts, the strategy is to acknowledge, contextualize, and bound them — never hide or minimize them. The memo treats failure to maintain status and failure to depart as expected as highly relevant negative factors, so these facts must be handled directly and well.

Hiding adverse facts is the worst strategy you can choose.

USCIS officers can see most of your immigration history already through I-94 records, prior visa applications, DS-160 forms, and border-crossing records. Minimizing or hiding what the officer can already see destroys your credibility on every positive equity in your package. Acknowledge, contextualize, and bound — never minimize.

Documentation Inventory of Adverse Facts

Inventory each adverse fact in your immigration history. For each, gather the underlying documentation so you can address it accurately:

<input type="checkbox"/>	Complete I-94 history (request from CBP at i94.cbp.dhs.gov)
<input type="checkbox"/>	Prior visa applications (DS-160s, DS-260s) where available
<input type="checkbox"/>	Prior immigration filings and outcomes
<input type="checkbox"/>	Documentation of any periods of unauthorized employment with dates and circumstances
<input type="checkbox"/>	Documentation of any prior visa denials with the denial notice
<input type="checkbox"/>	Documentation of any prior border issues, secondary inspection records, or expedited removals
<input type="checkbox"/>	Documentation of any prior misrepresentation issues
<input type="checkbox"/>	Documentation of any prior immigration violation or removal proceedings

Context and Mitigation Documentation

For each adverse fact, gather evidence showing context, mitigation, and that the violation is bounded:

<input type="checkbox"/>	Documentation of the circumstances surrounding any overstay (when it began, why you stayed)
<input type="checkbox"/>	Documentation that the violation has ended and not recurred
<input type="checkbox"/>	Documentation of full compliance since the violation ended

<input type="checkbox"/>	Evidence of any equities that arose during or after the violation (relationship, family, contributions)
<input type="checkbox"/>	Letters from witnesses who can speak to the circumstances of the adverse fact

Waiver Analysis (if applicable)

Some adverse facts require waivers in addition to discretionary advocacy. Review whether any of the following apply to your case and gather waiver-specific documentation:

<input type="checkbox"/>	Evaluation of whether INA §212(a)(9)(B) unlawful presence bar applies (3-year or 10-year)
<input type="checkbox"/>	If applicable, I-601A provisional waiver eligibility analysis
<input type="checkbox"/>	Evaluation of whether INA §212(a)(6)(C) misrepresentation ground applies
<input type="checkbox"/>	If applicable, I-601 waiver eligibility analysis
<input type="checkbox"/>	Evaluation of whether any criminal conviction triggers INA §212(a)(2) inadmissibility
<input type="checkbox"/>	If applicable, evaluation of available criminal waivers under INA §212(h)

When to escalate to representation.

If you have any of the following, this is the moment to use your Confidence Credit Guarantee and transition to representation: overstay longer than 180 days, any unauthorized employment, prior visa denial, any criminal history, any prior misrepresentation, or any prior immigration violation. Call Botelho Law Group at 508-500-1551 for a free consultation. Your full course fee credits in full toward representation.

CATEGORY 7 — WHY ADJUSTMENT FROM WITHIN THE U.S. IS APPROPRIATE

The category most applicants miss entirely. The memo frames adjustment of status as an extraordinary alternative to the ordinary consular immigrant visa process, and it puts the burden on you to justify it. Your discretionary statement should affirmatively explain why adjustment from inside the United States — rather than consular processing abroad — is the appropriate course in your specific case.

Family Impact of Separation

<input type="checkbox"/>	Cross-reference your family-impact documentation from Category 2
<input type="checkbox"/>	Specific documentation of the time period required for consular processing in your country
<input type="checkbox"/>	Documentation of why the family unit cannot reasonably withstand that period of separation

State Department Processing Backlog Documentation

<input type="checkbox"/>	Current visa wait times for your country and category (from travel.state.gov)
<input type="checkbox"/>	Documentation of consular post staffing reductions affecting your case
<input type="checkbox"/>	Documentation that your country is on the immigrant visa suspension list (if applicable)
<input type="checkbox"/>	News reports or official statements about consular processing delays

Medical or Travel Impediment

<input type="checkbox"/>	Letter from your physician describing any medical condition making international travel impractical or dangerous
<input type="checkbox"/>	Documentation of any required ongoing U.S.-based medical treatment that cannot be interrupted
<input type="checkbox"/>	Documentation of pregnancy or postpartum care (if applicable)

Caregiving Obligations Requiring Your Presence

<input type="checkbox"/>	Cross-reference caregiving documentation from Category 2
<input type="checkbox"/>	Documentation of the absence of alternative caregivers
<input type="checkbox"/>	Cost analysis of replacement professional caregiving

Country Conditions Falling Short of Asylum

<input type="checkbox"/>	U.S. State Department Country Reports for your country (current year)
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<input type="checkbox"/>	U.S. State Department travel advisories
<input type="checkbox"/>	Documentation of specific safety concerns affecting you personally or your family
<input type="checkbox"/>	Documentation of inadequate medical or social infrastructure in your country

Critical: do not argue that you should not consular process because of your overstay.

The wrong argument is: "I cannot consular process because I would face the 3-year or 10-year unlawful presence bar." That argument asks USCIS to reward the very failure-to-depart the memo identifies as a major adverse factor — it is self-defeating. The sound approach is to document the genuine family ties and humane considerations that make adjustment appropriate, and — where unlawful presence is in play — to address any departure problem through the I-601A provisional waiver process, not as a reason you should be excused from the consular route. Same underlying facts. Completely different framing.

Final Assembly Checklist

After completing all seven categories above, work through this final assembly checklist before filing your I-485 package.

Discretionary Statement

<input type="checkbox"/>	Discretionary Statement drafted using the companion template
<input type="checkbox"/>	All seven working categories addressed in the statement
<input type="checkbox"/>	Each section cross-references the corresponding exhibits in your evidence package
<input type="checkbox"/>	Statement reviewed for accuracy, specificity, and candor
<input type="checkbox"/>	Statement signed and dated in the presence of a notary
<input type="checkbox"/>	Notarized original retained for your records; certified copy included in I-485 package

Cover Letter

<input type="checkbox"/>	Cover letter updated to include the dedicated "Request for Favorable Exercise of Discretion" section
<input type="checkbox"/>	All forms listed in cover letter table of contents
<input type="checkbox"/>	All exhibits listed in cover letter table of contents
<input type="checkbox"/>	Fees calculated correctly and payment method confirmed

Exhibit Organization

<input type="checkbox"/>	Exhibits numbered in the order they are referenced in the Discretionary Statement
<input type="checkbox"/>	Each exhibit tabbed and divided in the package binder
<input type="checkbox"/>	Exhibit list prepared and matched against actual contents
<input type="checkbox"/>	Discretionary Statement is the final numbered exhibit (typically Exhibit Z or the highest-numbered exhibit)

Pre-Filing Review

<input type="checkbox"/>	All forms signed where required
<input type="checkbox"/>	All required medical, biometric, and supporting documentation included
<input type="checkbox"/>	Package copied in full for your records before mailing
<input type="checkbox"/>	Mailing method selected (USPS Priority Mail with tracking or FedEx with delivery confirmation)

<input type="checkbox"/>	Tracking number recorded
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Interview Preparation

<input type="checkbox"/>	Reviewed The Marriage Green Card System course Module 7, Lesson 7.7 on regular vs. Stokes interviews
<input type="checkbox"/>	Reviewed the four likely discretionary interview questions: why adjustment rather than consular processing; what factors make adjustment appropriate; family in home country; why you did not depart
<input type="checkbox"/>	Practiced answers verbally with spouse
<input type="checkbox"/>	Discretionary Statement and supporting evidence brought to the interview in organized format
<input type="checkbox"/>	Spouse rehearsed on his or her answers to corresponding interview questions

My Case Notes

Use this space to record case-specific details, deadlines, follow-up items, and questions for your attorney consultation.

Case identifiers

Application receipt number: _____

A-number (if assigned): _____

Filing date: _____

Basis of adjustment (e.g., spouse of U.S. citizen):

Documents requested but not yet received

Questions for attorney consultation

Resources

Companion materials for this checklist

To make full use of this checklist, you will want the companion materials available in The Marriage Green Card System course and on the Course Updates page at immigration-courses.com/updates:

- Discretionary Statement Template — the sworn declaration template referenced throughout this checklist
- Four Interview Questions Preparation Worksheet — for preparing answers to the four discretionary questions we anticipate USCIS officers will ask
- PM-602-0199 Update Video Playlist on YouTube @ImmigrationCoursesBotelho — long-form video walkthroughs of the entire update
- The Marriage Green Card System full course — comprehensive DIY guidance with the Confidence Credit Guarantee built in

When to escalate to attorney representation

This checklist and the companion materials are designed for applicants whose cases are straightforward enough for DIY preparation. If your case includes any of the following, consider transitioning to representation through Botelho Law Group PLLC and using your Confidence Credit Guarantee:

- Overstay longer than 180 days
- Any unauthorized employment history
- Prior visa denial or border issue
- Any criminal history, including arrests without convictions
- Prior misrepresentation to a consular or DHS officer
- Existing I-485 that has received an RFE on discretionary factors
- Existing I-485 that has been denied
- Notice of Intent to Deny received

Free Consultation with Botelho Law Group PLLC

Call: 508-500-1551

Schedule online: us-immigration-lawfirm.com/free-consultation/

Important: this is educational material, not legal advice.

This material provides general legal education for students of The Marriage Green Card System course. It does not create an attorney-client relationship with Botelho Law Group PLLC or any other attorney. USCIS policy, regulations, and adjudication practices change over time — verify current requirements before filing. For advice specific to your situation, schedule a free consultation with Botelho Law Group at 508-500-1551 or us-immigration-lawfirm.com/free-consultation/. Botelho Immigration Courses is offered by Botelho Financial Group LLC and is a separate entity from Botelho Law Group PLLC.