

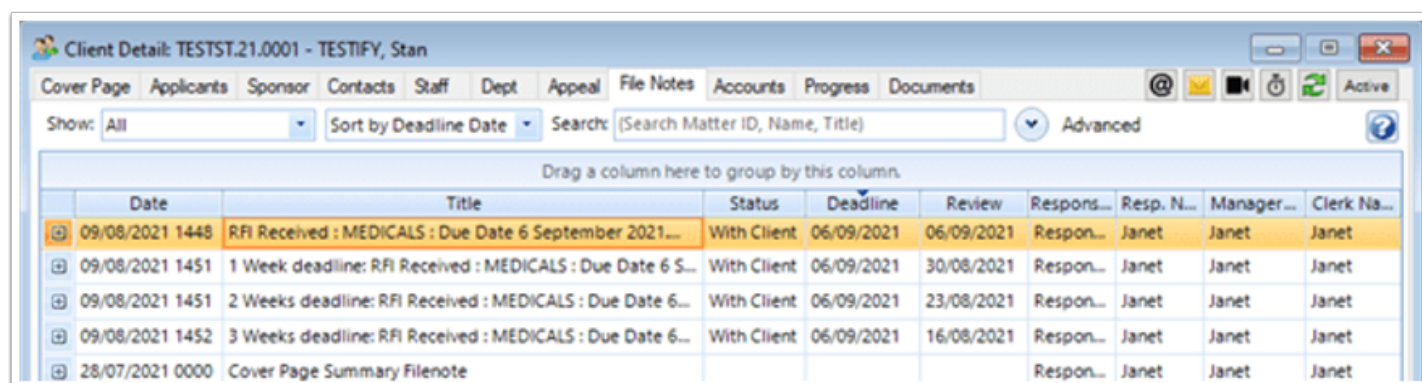
# Recording a 'Request for Further Information (RFI)' in Migration Manager

Migration Manager is a versatile program that can be used in a variety of ways depending on your process flow and your client's preferences. Highlighted below a few ways that an RFI can be recorded in Migration Manager

- Utilizing the [File Notes](#) feature
- [Creating a bespoke Progress Items](#)

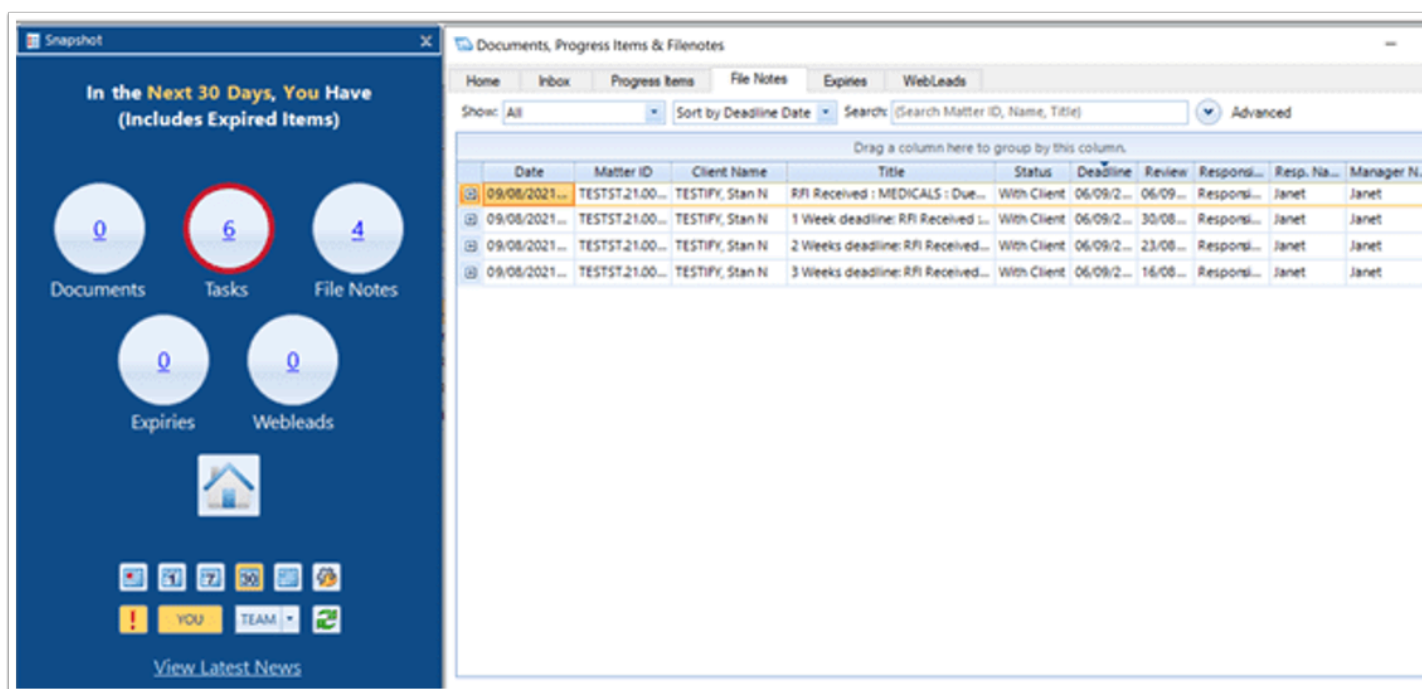
## Recording RFI information using File Notes

The [File Note](#) feature can be used to schedule follow-ups with clients for the allocated responsible person (Manager or Clerk) to ensure that the RFI is actioned and followed up.



Date	Title	Status	Deadline	Review	Respons...	Resp. N...	Manager...	Clerk Na...
09/08/2021 1448	RFI Received : MEDICALS : Due Date 6 September 2021...	With Client	06/09/2021	06/09/2021	Respon...	Janet	Janet	Janet
09/08/2021 1451	1 Week deadline: RFI Received : MEDICALS : Due Date 6 S...	With Client	06/09/2021	30/08/2021	Respon...	Janet	Janet	Janet
09/08/2021 1451	2 Weeks deadline: RFI Received : MEDICALS : Due Date 6...	With Client	06/09/2021	23/08/2021	Respon...	Janet	Janet	Janet
09/08/2021 1452	3 Weeks deadline: RFI Received : MEDICALS : Due Date 6...	With Client	06/09/2021	16/08/2021	Respon...	Janet	Janet	Janet
28/07/2021 0000	Cover Page Summary Filenote				Respon...	Janet	Janet	Janet

Reminders will pop up in [SnapShot](#) in the File Notes sections for action for the allocated responsible person.



## Recording RFI information using a bespoke Progress Items

You can use a bespoke Progress Items checklist to record and monitor RFI's to manage your client files.

Identify the key milestones and important dates you want to capture in Migration Manager and create two [bespoke 'Progress Item' Template lists](#) that you can add to any of your actions or lodged applications if you receive a formal RFI from the Department of Home Affairs and if you need to request an extension of the RFI deadline.

By capturing this information in Migration Manager, you are able to pull reports weekly to identify follow up activities required for your cases and/or generate reminders for your daily work flow through the Migration Manager [SnapShot](#) feature.

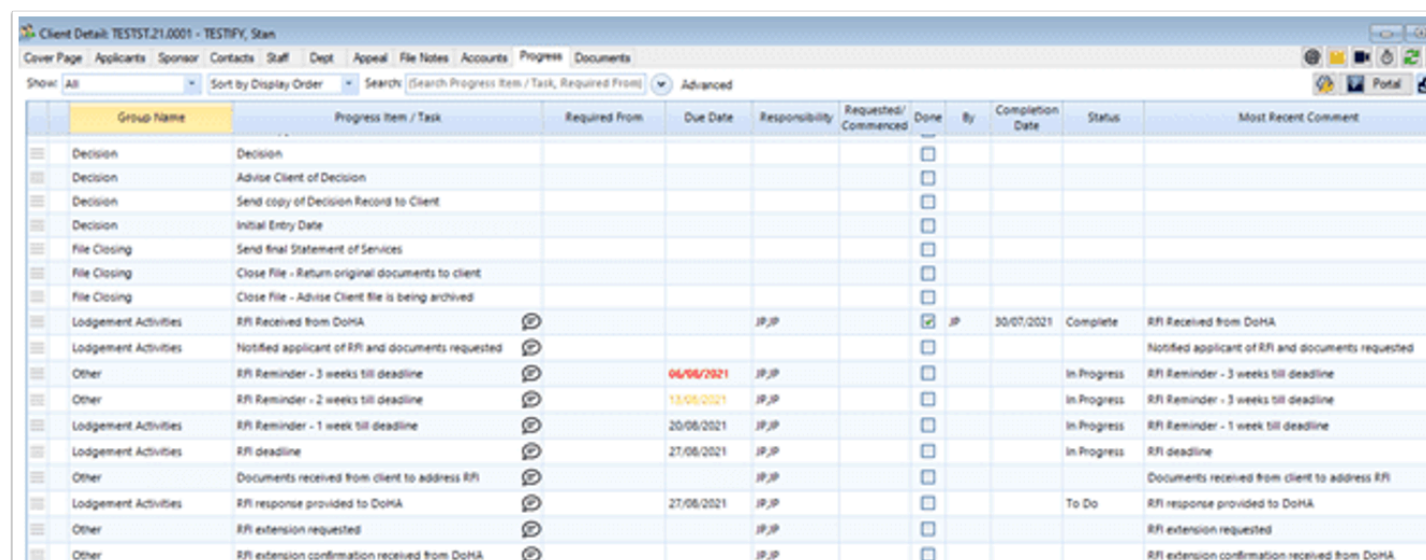
Below is an example of the RFI Progress Item Template list to show you how you can monitor your RFI's in Migration Manager.

### RFI Progress Item Template list example:

Configure Progress Lists		
Progress Category	Progress List	Progress Item
Favourites Appeal Business Nominations & Links Business Sponsorship Citizenship Compliance Family Sponsorship Other Request for further information Skills Assessment	Request for further information (RFI)	Lodgement Activities RFI Received from DoHA
	Request for further information (RFI) - Extension	Lodgement Activities Notified applicant of RFI and documents requested
		Other RFI Reminder - 3 weeks till deadline
		Other RFI Reminder - 2 weeks till deadline
		Lodgement Activities RFI Reminder - 1 week till deadline
		Lodgement Activities RFI deadline
		Other Documents received from client to address RFI
		Lodgement Activities RFI response provided to DoHA

Once the list has been added to the matter's the progress items list on a file, you are able to create due dates for the items which can be allocated responsible person.

You can also add these activities to the [Secure Client Portal](#) to keep your client informed of the visa application status and/or [communicate with your client about any documents required through the Secure Client Portal](#)



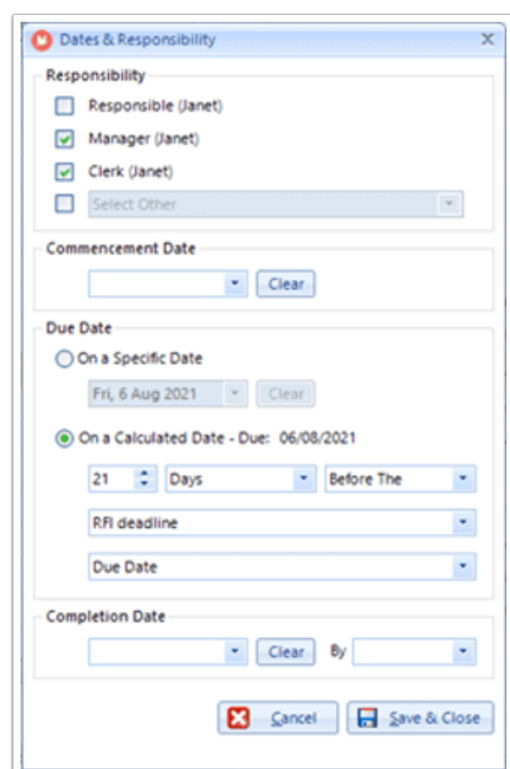
Client Detail: TEST121.0001 - TESTIFY, Stan

Cover Page | Applicants | Sponsor | Contacts | Staff | Dept | Appeal | File Notes | Accounts | Progress | Documents

Show: All | Sort by Display Order | Search: [Search Progress Item / Task, Required From] | Advanced

Group Name	Progress Item / Task	Required From	Due Date	Responsibility	Requested/Commenced	Done	By	Completion Date	Status	Most Recent Comment
Decision	Decision					<input type="checkbox"/>				
Decision	Advise Client of Decision					<input type="checkbox"/>				
Decision	Send copy of Decision Record to Client					<input type="checkbox"/>				
Decision	Initial Entry Date					<input type="checkbox"/>				
File Closing	Send final Statement of Services					<input type="checkbox"/>				
File Closing	Close File - Return original documents to client					<input type="checkbox"/>				
File Closing	Close File - Advise Client file is being archived					<input type="checkbox"/>				
Lodgement Activities	RFI Received from DoHA			JP/JP		<input checked="" type="checkbox"/>	JP	30/07/2021	Complete	RFI Received from DoHA
Lodgement Activities	Notified applicant of RFI and documents requested					<input type="checkbox"/>				Notified applicant of RFI and documents requested
Other	RFI Reminder - 3 weeks till deadline		06/08/2021	JP/JP		<input type="checkbox"/>			In Progress	RFI Reminder - 3 weeks till deadline
Other	RFI Reminder - 2 weeks till deadline		13/08/2021	JP/JP		<input type="checkbox"/>			In Progress	RFI Reminder - 3 weeks till deadline
Lodgement Activities	RFI Reminder - 1 week till deadline		20/08/2021	JP/JP		<input type="checkbox"/>			In Progress	RFI Reminder - 1 week till deadline
Lodgement Activities	RFI deadline		27/08/2021	JP/JP		<input type="checkbox"/>			In Progress	RFI deadline
Other	Documents received from client to address RFI			JP/JP		<input type="checkbox"/>				Documents received from client to address RFI
Lodgement Activities	RFI response provided to DoHA		27/08/2021	JP/JP		<input type="checkbox"/>			To Do	RFI response provided to DoHA
Other	RFI extension requested			JP/JP		<input type="checkbox"/>				RFI extension requested
Other	RFI extension confirmation received from DoHA			JP/JP		<input type="checkbox"/>				RFI extension confirmation received from DoHA

In the progress item, the auto calculator can be used to specified follow up dates.



**Dates & Responsibility**

**Responsibility**

☐ Responsible (Janet)

☒ Manager (Janet)

☒ Clerk (Janet)

☐ Select Other

**Commencement Date**

**Due Date**

☐ On a Specific Date

☒ On a Calculated Date - Due: 06/08/2021

**Completion Date**

By

These tasks flow through to the [SnapShot](#) screen to notify the responsible person that there are tasks that need attention.

Snapshot

In the Next 7 Days, the Team has (Includes Expired Items)

Documents

Tasks

File Notes

Expiries

Webleads

View Latest News

Documents, Progress Items & Filenotes

Home

Inbox

Progress Items

File Notes

Expiries

WebLeads

Show: All

Sort by Due Date

Search: [Search Progress Item / Task, Required From]

Advanced

Matter	Group Name	Progress Item / Task	Required From	Due Date	Responsibility
TESTST.21.0001 (TESTIFY, St...	Other	RFI Reminder - 3 weeks till deadline		06/08/2021	JP/JP
TESTST.21.0001 (TESTIFY, St...	Other	RFI Reminder - 2 weeks till deadline		13/08/2021	JP/JP
TESTST.21.0001 (TESTIFY, St...	Primary Applicant	Primary Applicant - Birth Certificate	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Primary Applicant	Primary Applicant - Marriage Certificate (Previous)	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Primary Applicant	Primary Applicant - Passport	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Skills	Skills - Academic Record or Course Transcript	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Skills	Skills - Curriculum Vitae	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Skills	Skills - Employment Contract	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Skills	Skills - English Language Test Results Certificate	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Skills	Skills - Offer of Employment	Stan N TESTIFY	04/08/2021	
TESTST.21.0001 (TESTIFY, St...	Skills	Skills - Qualification Certificate	Stan N TESTIFY	04/08/2021	

## RFI Progress Item Template list example

Configure Progress Lists

Progress Category	Progress List	Progress Item
Favourites	Request for further information (RFI)	Other RFI extension requested
Appeal	Request for further information (RFI) - Extension	Other RFI extension confirmation received from DoHA
Business Nominations & Links		
Business Sponsorship		
Citizenship		
Compliance		
Family Sponsorship		
Other		
Request for further information		
Skills Assessment		
Visa Application		

Once the RFI extension has been added to the client's progress tab, you can add in the relevant dates for reporting purposes.

Other	RFI extension requested		JP/JP		RFI extension requested
Other	RFI extension confirmation received from DoHA		JP/JP		RFI extension confirmation received from DoHA

This is a useful feature in MM as you are able to create a specific [report](#) to capture information recorded in the Progress Items tab.

**Reports**

User-Defined Reports | Saved Reports | Preset Reports | Accounts Reports | System Reports

Limit Migrant results to Primary Applicant only ☒

**Automatically Include**

☒ Applicant Surname ☒ Applicant Given Names ☐ Applicant Preferred Name ☐ Applicant Prefix ☐ Applicant D.O.B. ☐ Applicant Gender

☒ Matter Type ☐ Alternative Reference ☒ File Status

**Add Columns to Report**

1. Select Category: SKILLS ASSESSMENT / AUTHORITY / OFFER, FILENOTES, VISA HISTORY, BUSINESS HISTORY, EDUCATION/QUALIFICATIONS, EMPLOYMENT HISTORY, HEALTH, ACCOUNTS, DOCUMENT REGISTER, APPEALS, **PROGRESS**, HUMANITARIAN, INTENDED STUDY, TRAVEL HISTORY

2. Choose Report Column: Notified applicant of RFI and documents requested ... [Item Status], RFI deadline ... [Item Due Date], RFI deadline ... [Item Requested/Commenced Date], RFI deadline ... [Item Complete], RFI deadline ... [Item Completion Date], RFI deadline ... [Item User Comments], RFI deadline ... [Item Most Recent User Comment], RFI deadline ... [Item Most Recent User Comment Without Header], RFI deadline ... [Item Completion Recorded By], RFI deadline ... [Item Responsibility]

3. Set Filters (optional)...

4. Set Values for Filters. Separate multiple values with 'or'. E.g. migrant or sponsor

5. Add the Column: Add Column

Search Columns: RFI

Column Name	Filter Type	Filter Value
VisaApplicationLodgementDate		
RFI deadline ... [Item Due Date]		

↓ ↑ Edit Remove Remove All

Delete Save 6. Process

Once you are confident that the report captures the information you require, this report can be saved and run at the beginning of each week to assist with your file management and workload overview.

**Report Results**

Export Batch VEVO mode OFF View Client Close

ClientID	ApplicantSurname	ApplicantGivenN...	Matter Type	ClientStatus	VisaApplicationL...	RFIdeadline_It...
SIMP0001	Simpson	Margaret	820 - Partner	Initial Consultati...		
SIMP0002	Simpson	Homer				
SIMP0003	Simpson	Margaret	101 - Child			
SIMP0004	Simpson	Lisa	101 - Child	Confirmation of L...		
TEST0001	Test	Jonathan				
TESTJA.17.0001	Test	James				
TESTST.21.0001	TESTIFY	Stan N	186 - Employer...	Service Agreem...		27/08/2021

Please consult the [Migration Manager user manual](#) for technical instructions for the features available in MM.