

# Managing your matters with future reminders – Active & Inactive Matter Status

Once you have finalised an application in MM, you may have reason to create a follow-up to check in with your client to discuss further eligibility for a visa application or citizenship. What status would you use in this scenario?

MM has active and inactive status'. **File Closed** and **File Closed – To Be Archived** are inactive status. If you change the status to **File Closed** or **File Closed – To Be Archived**, your scheduled reminder for the future will not appear in your Snap Shot list in the future to prompt you to contact the client.

I am aware that some Immigration Professionals approach this in a few different ways.

1. Create a new **Matter Status** (i.e., **Approved** or **Ongoing Monitoring**). For example, if further applications or pathways have been discussed, the responsible person would change the complete matter to the new status so that the reminder will appear in the future to prompt them to contact the client.
2. Once that matter has been completed, some users change the status to **File Closed**. To create a reminder to the same client, they then duplicate the matter as a **Prospect** with the new application type listed on the summary page, reference to the **File Closed** case in the summary note, and either a file note or progress item scheduled for the future to contact the client.