

Using the Secure Client Portal

The secure client portal is a website that allows agents and clients to communicate with each other securely. It gives the ability to:

- Send and receive questionnaires.
- Send and receive messages.
- Provide and receive documents.
- Allows the clients to know how their application is progressing.

Getting to know the various sections of the Portal

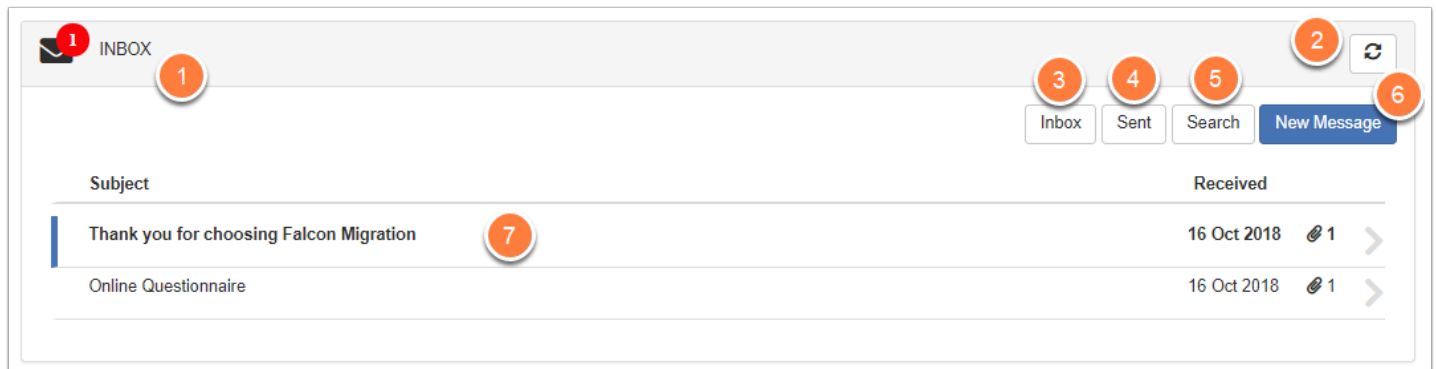
1. The Main details section

1. Your **File Reference Number**.
2. Your **User Icon**. You can click on this icon to:
 - Change your **User Name**.
 - Change your **Password**.
 - Or to **Logout**.
3. **Logout** of the Portal.
4. The **Business Details** of your Agent.
5. The specific **Contact Details** for the person handling your case.

The screenshot shows the Secure Client Portal interface. At the top left is the Falcon Migration logo. The main header area contains the text 'Document Portal' and 'File RefNo: SMITBR.18.0071' (callout 1). On the right, there is a 'Logout' link (callout 3) and a user greeting 'Hello, Brian Smith' next to a user icon (callout 2). Below the header, there are two main sections: 'Business' and 'Contact Details'. The 'Business' section (callout 4) lists: Business Name (Falcon Migration), Street Address (123 Brisbane Street), Suburb (South Brisbane), State (QLD), and Postcode (4000). The 'Contact Details' section (callout 5) lists: Name (Marco Polo), Email (Marco@test.com), Phone (55 55 555555555), and MARN (444555666).

2. Your Message Inbox

1. Your **Inbox** showing the number of *unread* messages.
2. The **Refresh** button. You can use this to refresh your Inbox if you know your Agent has just sent communication.
3. The **Inbox** icon will open up a Larger window to view all your Inbox items.
4. The **Sent** icon will open up a Larger window to view all your Sent items.
5. The **Search** icon allows you to search for specific **Subject** or **Body** text in your messages.
6. The **New Message** icon allows you to send messages to your Agent via the Secure Portal.
7. The list of your **received** messages. **Click anywhere** on a row to open that message.



3. Activities

The Activities Window shows you all the Activities for the Application. This is an easy way for you to track the progress of your application.

1. The **Description** of the Activity.
2. The **Due Date** for this Activity to be completed by.
3. When the Agent marks the Activity is complete, a **green tick** will appear in the **Done** column.
4. The **Refresh** button. You can use this to refresh your Activities if you know your Agent has just made a change.


ACTIVITIES			4	
Description	1	2	3	
		Due Date	Done	
Initial Consultation Assessment		15 Oct 2018		
VEVO Search		16 Nov 2018		
Confirmation of Instructions Letter sent		18 Nov 2018		
Consumer Information Sheet Provided to Client		18 Nov 2018		
Payment of Deposit		25 Nov 2018		

4. Documents Required From You

The **Documents Required from You** section is a list of Documents your Agent requires to be able to process the application.

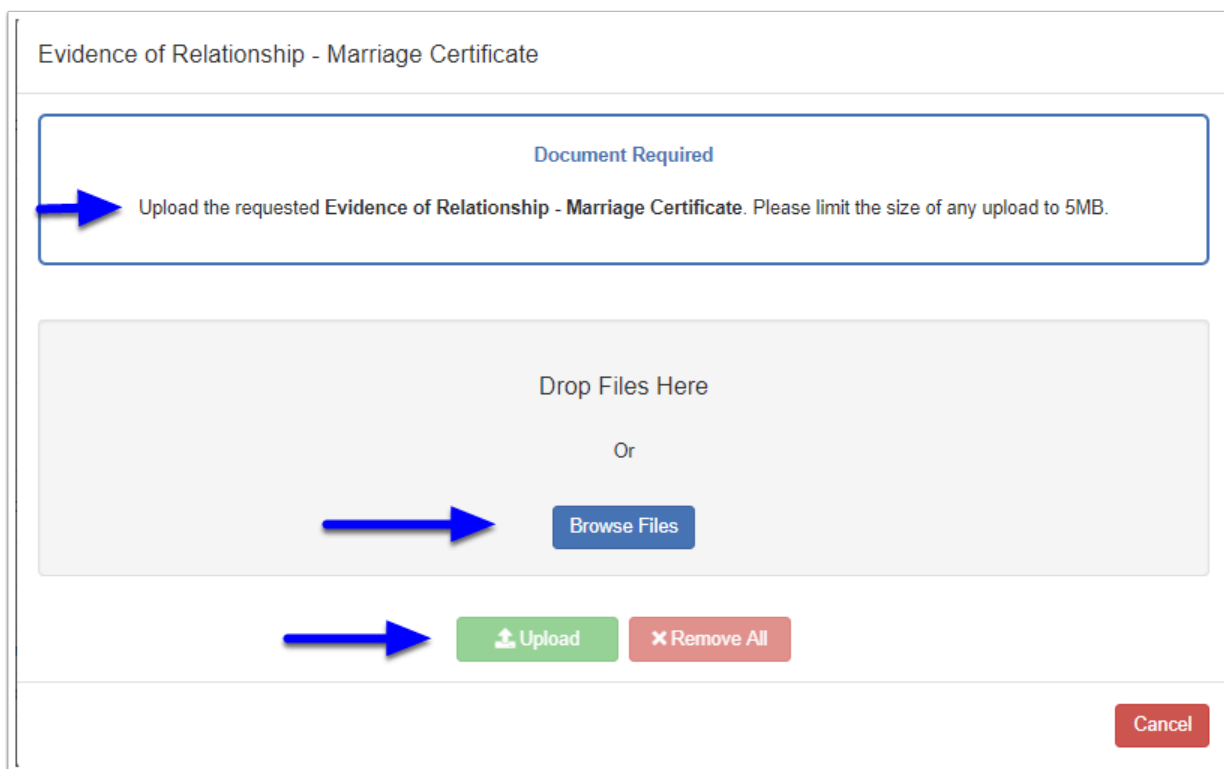
1. The **Description** of the Document Required. **Click anywhere** in the line to open details of the request and to upload that document (see section 4.1).
2. The **Due Date** this Document is required by.
3. The **Upload Status**, See point 4 for the Legend details.
4. The Upload Status **Legend**:
 - **Upload Required**. The Document has not yet been uploaded to the Agent.
 - **Complete**. The Document has been uploaded to the Agent.
 - **Rejected**. The document has been uploaded, but has since been rejected by the Agent. This may be because of quality issues, incomplete documents or the incorrect document was supplied.

DOCUMENTS REQUIRED FROM YOU				5	
Your agent has requested the following documents from you, please select an item to view more information or to upload a document.					
Description	1	2	Due Date	Upload	3
Cost Agreement - Migrant			17 Nov 2018		
Primary Applicant - Birth Certificate.Brian Smith			28 Nov 2018		
Evidence of Relationship - Marriage Certificate			28 Nov 2018		
Sponsor - Birth Certificate.			28 Nov 2018		
Upload Required Completed Rejected					

-  By clicking anywhere in the line for the required document, a window will appear giving you details of the Document and the ability to upload that document to the Agent.

4.1. Clicking a Document with the Status of "Upload Required"

A description of the **Document Required** will show. Click the **Browse Files** button to select your File/s (or Drag and Drop), then click the **Upload** button to upload the document/s to the Agent.



Evidence of Relationship - Marriage Certificate

Document Required

Upload the requested Evidence of Relationship - Marriage Certificate. Please limit the size of any upload to 5MB.

Drop Files Here

Or

Browse Files

Upload **Remove All**

Cancel

4.2. Clicking a Document with the Status of "Complete"

Details of the Document/s you have uploaded will appear including the time of upload. If you wish to add additional documents, you can click the **Upload** button.

Cost Agreement - Migrant

Completed

Any documents that you have uploaded via the Portal for this item will appear below. You can upload additional items using the Upload button. Please limit the size of any upload to 5MB.

Name	Uploaded	Size
TEST02.pdf	16 Oct 2018 10:28 AM	33.55 kB

Upload

Close

4.3. Clicking a Document with the Status of "Rejected"

When an Agent has had to reject a document, they will enter a reason for the Rejection.

Click the **Browse Files** button to select your new File/s (or Drag and Drop), then click the **Upload** button to upload the new document/s to the Agent.

Primary Applicant - Birth Certificate.Brian Smith

Upload Rejected

The Scan of your Birth Certificate was not clear enough. Please re-scan and send through

Drop Files Here

Or

Browse Files

Upload

Remove All

Cancel

Below is a video guide on how to use the Secure Client Portal