

Send a Questionnaire - By Email

The questionnaires enable a client to provide an agent with nearly* all the relevant information for the type of visa that is being applied for. The ability to use many aspects of the program including Letter and Form merging, eVisa etc is highly dependent on good data being in Migration Manager. The questionnaires provide an easy method for an agent to be able to collect this data and import it into Migration Manager.

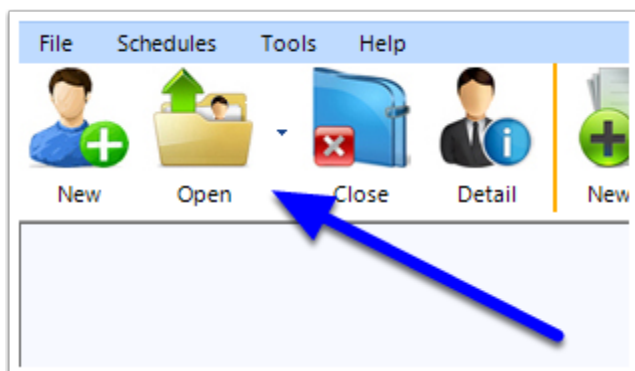
There are 3 types of migration questionnaires:

1. Initial Questionnaire. This is a short questionnaire that aims to ask enough questions for an agent to be able to assess a Prospect or New Clients situation and advise them of the appropriate course of action.
2. Temporary Questionnaire. This is a medium length questionnaire that aims to ask enough questions and collect enough data for an agent to prepare a temporary visa such as a Subclass 482 Visa.
3. Full Questionnaire. This is a full length questionnaire that aims to collect a large amount of data so as to cover a majority of the questions for most permanent residence visa applications.

*Please note that the questionnaire tries to cover the majority of data points required for the majority of all visas. Due to the number of visas and the resulting number of questions the questionnaire is not able to cover a 100% of the field. We aim to refine the questionnaires over time to improve coverage.

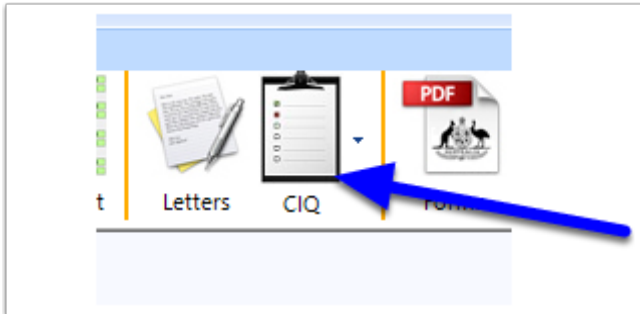
1. Open the Matter

Before you can send a Questionnaire you must open the relevant matter. To open a matter click the **Open** button and then select and open the required matter.



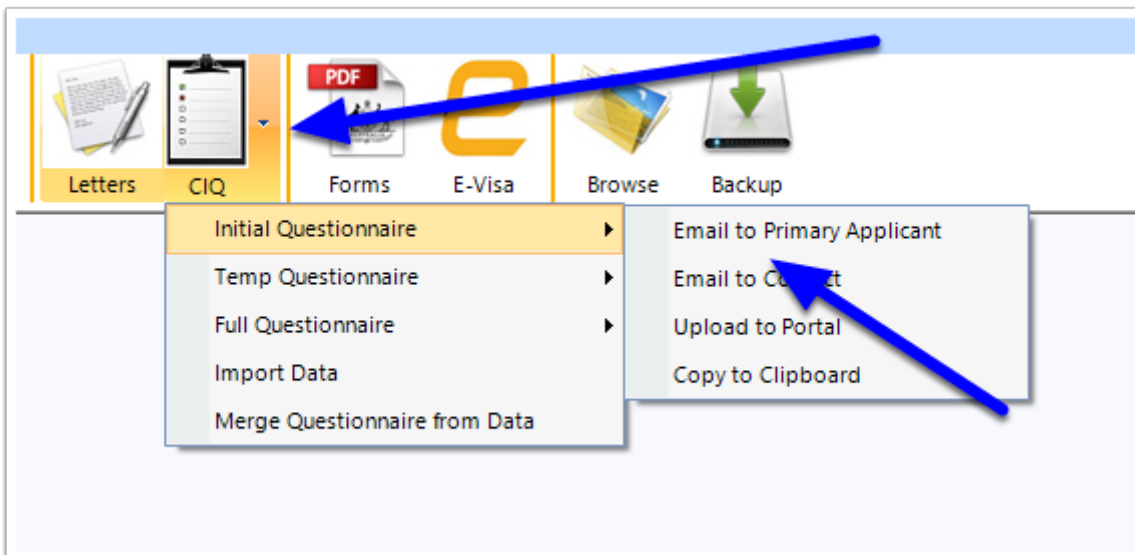
2. Click the CIQ or BSQ Button

Once the matter is open, click the CIQ button in the main toolbar. If you have a Business Sponsor Matter open, the CIQ button will be replaced by the BSQ button (Business Sponsor Questionnaire).



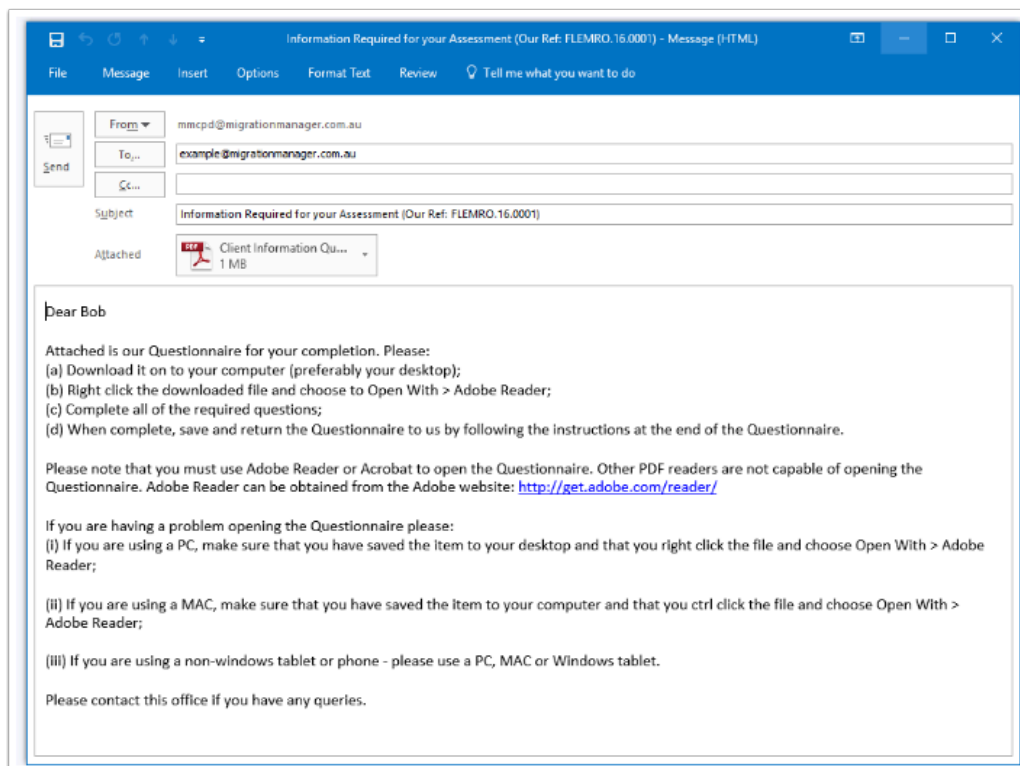
3. Choose the Questionnaire type

When you click the CIQ or BSQ button, you will be present with a number of different types of Questionnaires to choose from. Choose which type of questionnaire you wish to send and who you want to send it to. For example, if you wish to send an Initial Assessment Questionnaire to a migrant, click the first option and then choose Email to Primary Applicant.



4. Review the Questionnaire Email

A new email should open up, with the client's email address listed and the questionnaire attached with instructions for your client on how to proceed. Note that you may need to add your Signature to the bottom of the email using Outlook's standard insert Signature option.



5. Send the Questionnaire.