

Progress Items - How to add a Document and Tasks Checklist to a Matter (Pre Version 8.8.1.0)

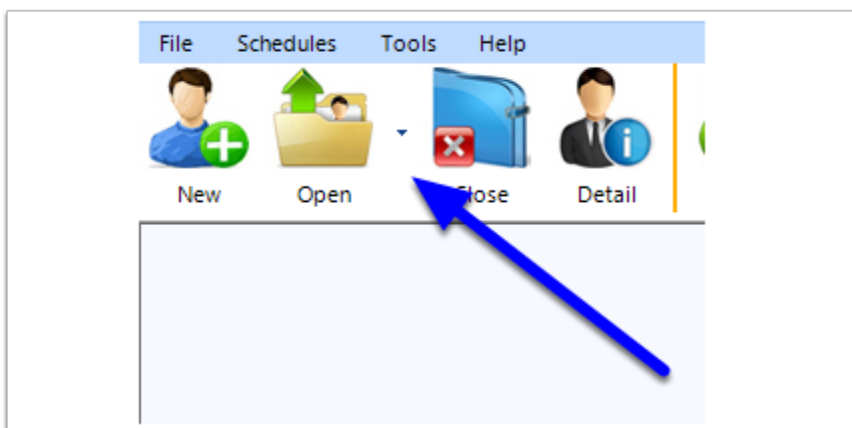
The Progress Items function within Migration Manager allows a user to set a list of documents and activities/tasks in a matter and track when these tasks/documents are required to be attended to or have been completed. Migration Manager has a built in set of Progress Items checklists available for most visa types that based on the Immigration Department's issued document checklists.

The information in the Progress tab also directly links into Snapshot which allows users to quickly and easily keep track of their caseload activity.

This article covers how to add a basic checklist to a Matter.

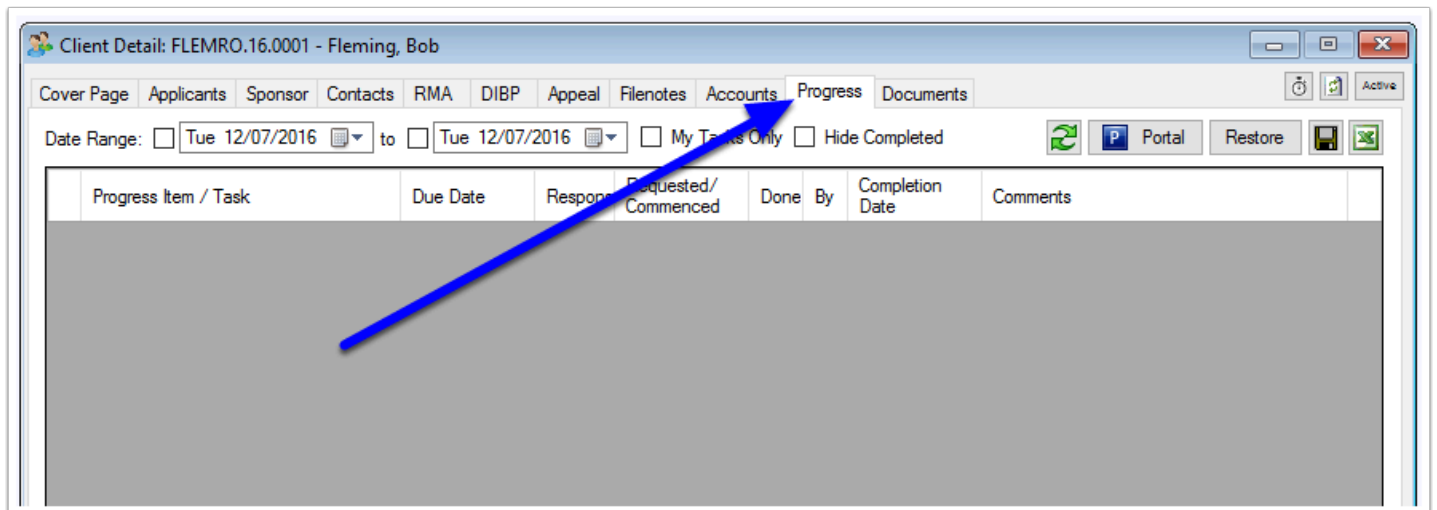
1. Open the Matter

First click the '**Open**' button in the main menu to open the relevant Matter that you want to add a checklist to.



2. Go to the Progress Tab

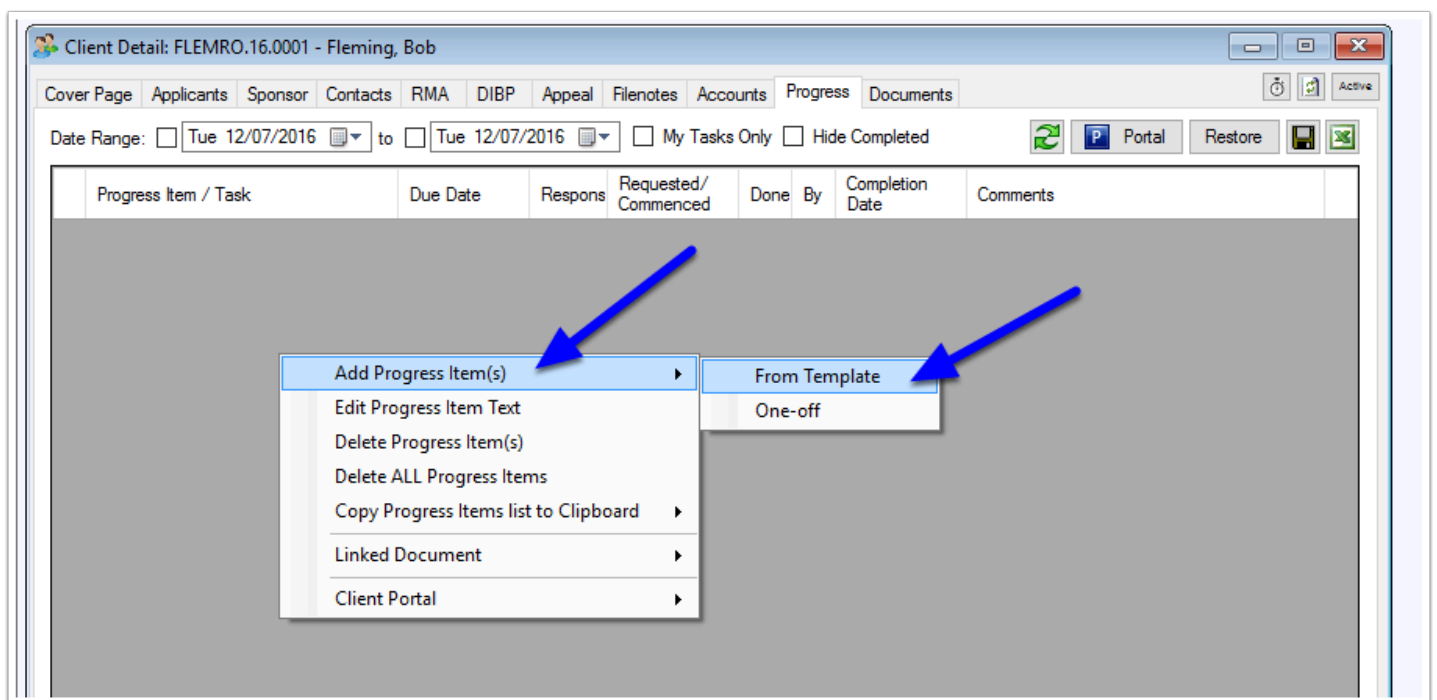
Once the matter window opens, click the **Progress** tab. If this is the first time you have opened the *Progress* tab for this matter it will contain a blank screen.



Creating a Checklist from a Template

1. Right Click and select 'Add Progress Items' > 'From Template'

Now right click anywhere on the grey screen and from the context menu choose 'Add Progress Item(s)' and then select 'From Template'.



2. Select the Checklist to use

From the 'Matter Type' dropdown, select the checklist that you want to use. In this example we will be using the 'Short List'.

Client: FLEMRO.16.0001 - Fleming, Bob

1. Review/Modify Progress Template Filters

Matter Type: [Dropdown]

Marital Status: [Dropdown]

Spouse is: [Dropdown]

2. Review/Modify Progress Items Selection

Hide Items Already Added: ☐ Hide Unticked Presets: ☒ Items in View: [0]

Buttons: Clear Selection, Select Preset, Select All, Prefix Items with Group: ☐, Cancel, 3. Commit

3. Untick the items you don't want in your checklist

The next step is for you to review the pre-set list of documents/tasks and determine if all of the pre-set items are relevant to the matter at hand. Those items which you determine are not relevant to the matter at hand should be unticked.

Client: FLEMRO.16.0001 - Fleming, Bob

1. Review/Modify Progress Template Filters

Matter Type: Short List

Marital Status: [Dropdown]

Spouse is: [Dropdown]

No. of Migrating Dependents: Under 16 yrs: [0] 16/17 yrs: [0] +18 yrs: [0]

Age of Eldest Migrating Dependant: [0]

No. of Non-Migrating Dependents: [0]

2. Review/Modify Progress Items Selection

Hide Items Already Added: ☐ Hide Unticked Presets: ☒ Items in View: 12

UserDefinedFieldName	Group	Selection	Number to add
Initial Consultation / Assessment	Starting Activities	<input checked="" type="checkbox"/>	1
Confirmation of Instructions Letter sent	Starting Activities	<input checked="" type="checkbox"/>	1
Consumer Information Sheet Provided to Client	Starting Activities	<input checked="" type="checkbox"/>	1
Cost Agreement - Migrant	Starting Activities	<input checked="" type="checkbox"/>	1
Payment of Deposit	Starting Activities	<input checked="" type="checkbox"/>	1
Client Questionnaire	Starting Activities	<input checked="" type="checkbox"/>	1
Request Documents Required	Starting Activities	<input type="checkbox"/>	1
Receive Documents Required	Lodgement Activi...	<input type="checkbox"/>	1
Lodge Visa Application	Lodgement Activi...	<input type="checkbox"/>	1
Decision	Decision	<input type="checkbox"/>	1
Send final Statement of Services	File Closing	<input type="checkbox"/>	1
Close File - Archive File	File Closing	<input type="checkbox"/>	1

Buttons: Clear Selection, Select Preset, Select All, Prefix Items with Group: ☐, Cancel, 3. Commit

4. Click 'Commit'

Click the '**Commit**' button to add the selected items to this matters *Progress* tab.

<input checked="" type="checkbox"/>	Cost Agreement - Migrant	Starting Activities	<input checked="" type="checkbox"/>	1
	Payment of Deposit	Starting Activities	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	Client Questionnaire	Starting Activities	<input checked="" type="checkbox"/>	1
	Request Documents Required	Starting Activities	<input type="checkbox"/>	1
	Receive Documents Required	Lodgement Activi...	<input type="checkbox"/>	1
	Lodge Visa Application	Lodgement Activi...	<input type="checkbox"/>	1
	Decision	Decision	<input type="checkbox"/>	1
	Send final Statement of Services	File Closing	<input type="checkbox"/>	1
	Close File - Archive File	File Closing	<input type="checkbox"/>	1

Clear Selection

Select Preset


Select All

Prefix Items with Group ☐

Cancel

3. Commit

ng Dependants 0



The selected Progress Items have been added to the client's file.

ded to Client

Starting Activitie

5. Basic list created

The selected Progress Items from the template will now be added to this matters *Progress* Tab

Client Detail: FLEMRO.16.0001 - Fleming, Bob

Cover Page Applicants Sponsor Contacts RMA DIBP Appeal Filenotes Accounts Progress Documents

Date Range: ☐ Tue 12/07/2016 to ☐ Tue 12/07/2016 ☐ My Tasks Only ☐ Hide Completed

Progress Item / Task	Due Date	Respos	Requested/ Commenced	Done	By	Completion Date	Comments
<input type="checkbox"/> Initial Consultation / Assessment				<input type="checkbox"/>			
<input type="checkbox"/> Confirmation of Instructions Letter sent				<input type="checkbox"/>			
<input type="checkbox"/> Consumer Information Sheet Provided to Client				<input type="checkbox"/>			
<input type="checkbox"/> Cost Agreement - Migrant				<input type="checkbox"/>			
<input type="checkbox"/> Payment of Deposit				<input type="checkbox"/>			
<input type="checkbox"/> Client Questionnaire				<input type="checkbox"/>			

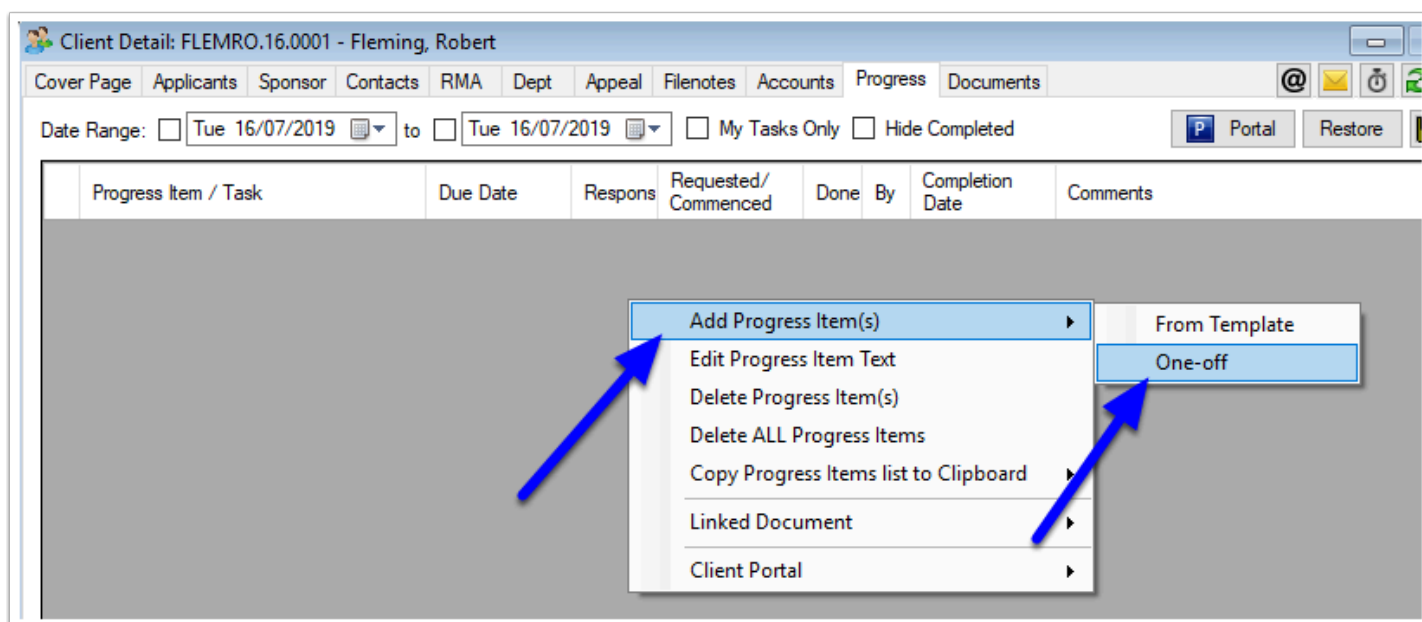
☐ Sort Mode 0 of 6 done (0%) Prompt for Scan/Link Document ☒

Add a One-Off Progress Item

If you wish to just add a one-off Progress Item for this Matter (An Item that is not in a progress template and wont be used again), then you can add a One-Off Progress Item.

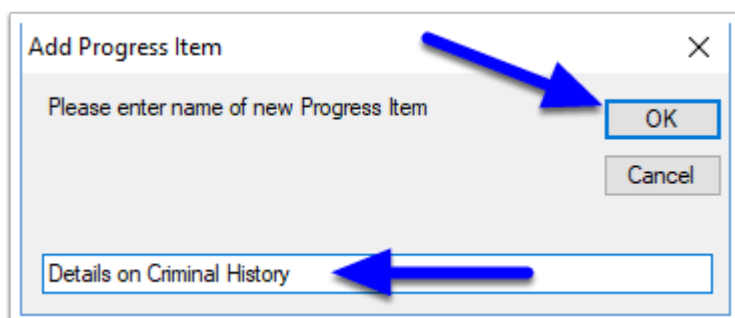
1. Right Click and select 'Add Progress Items' => 'One-Off'

Right click anywhere on the grey screen and from the context menu choose **Add Progress Item(s)** and then select **One-Off**.

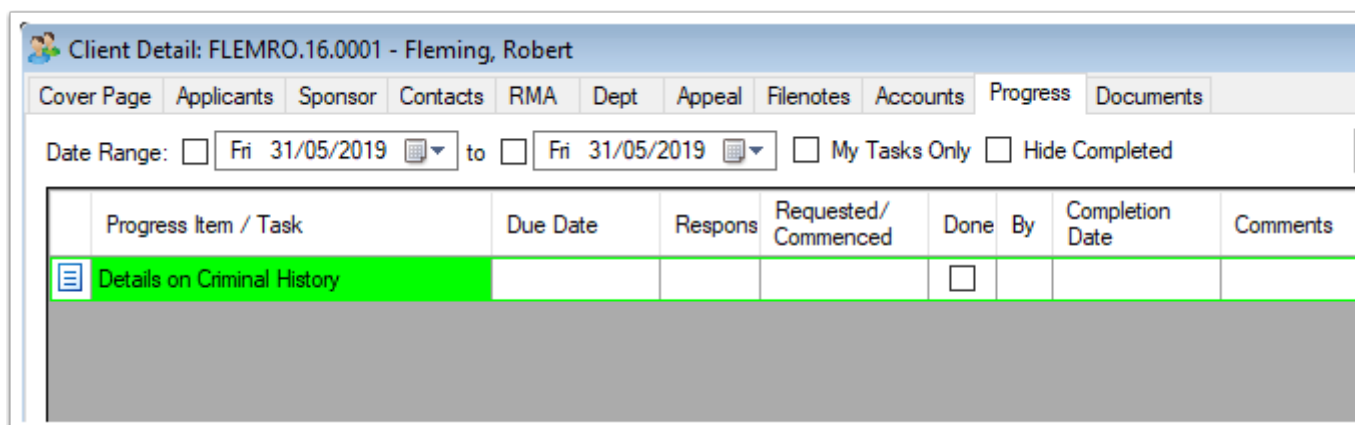


2. Enter the Description

When the *Add Progress Item* window appears, enter the **Description** of this Progress Item, then click **OK**.



3. The item will appear on the Progress list




4. Choose Progress Item Type

A Progress Item can either be a **Document** Item or an **Activity**. Example:

- A Document Item may be a Request for a Form, or a Form needing to be sent.
- An Activity Item is usually a task that needs to be completed.

Double click the **Document icon** on the left of the row to toggle between the item being a Document or an Activity.

(Blank means Activity, Document icon means Document)

Progress Item / Task	Due Date	Respons	Requested/Commenced	Done	By	Completion Date	Comments
 Details on Criminal History				<input type="checkbox"/>			

i Once you have started adding items to the *Progress* tab of a Matter you can then do a number of different things with this list including:

- Add additional items to a matters checklist
- Tracking due and completed dates using the Progress list and Snapshot
- Scan or Bookmark received items
- [Request documents via the Secure Client Portal](#)