

# How to send a Form via the Secure Client Portal

When you have merged a Form in Migration Manager, you will need to send it to the Client for their review. The following article sets out how to send merged Forms via an Encrypted Message in the Secure Client Portal.

**Note:** The instructions below are for using Migration Manager version 8.5.3 or newer.

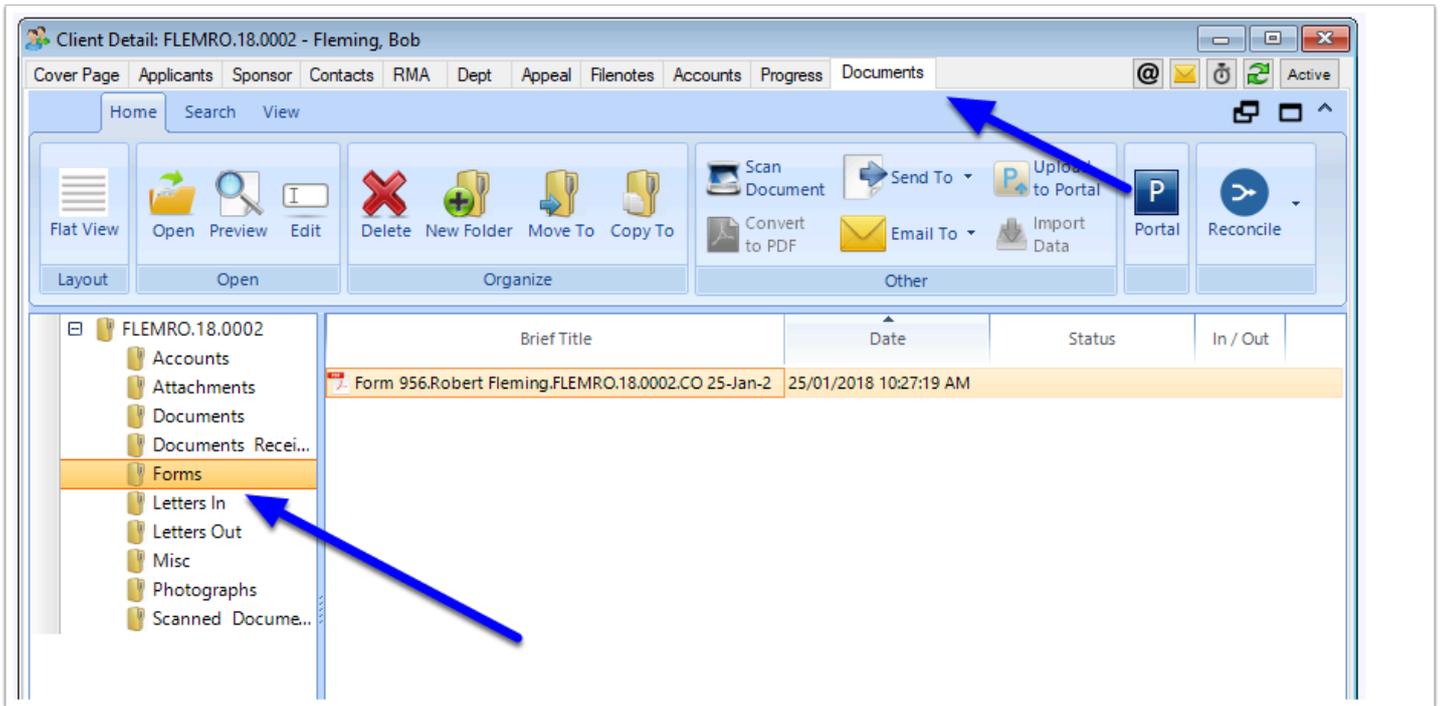
## 1. Merge the Form

First you will need to merge the Form in Migration Manager. For instructions on how to Merge a Department PDF form please see: [How to Merge a Department Form](#)

The screenshot shows the 'DIBP PDF Form-Filler' application window. On the left, there are sections for '1. Select Form' (with a dropdown menu showing '956'), '2. Select Person' (with a dropdown menu showing 'Robert James Fleming' and a 'Relationship to PA' dropdown showing 'Primary Applicant'), and 'Output' (with radio buttons for 'UPPER' and 'As Stored in Database', a filename field, and checkboxes for 'Append With Date/Time' and 'Add User's Initials'). A green 'Merge Form' button is located at the bottom right of the left panel. A blue arrow points to this button. On the right, a 'Preview' pane shows a document titled 'Advice by a migration agent/exempt person of providing Immigration assistance' with a form number '956' in the top right corner. The document content includes sections for 'Who should use this form?', 'Non-registered migration agents outside Australia', 'Exempt persons', 'Do not use this form if', 'What is Immigration assistance?', and 'Authorised recipient'. A 'Sign In' button is visible in the top right of the preview pane.

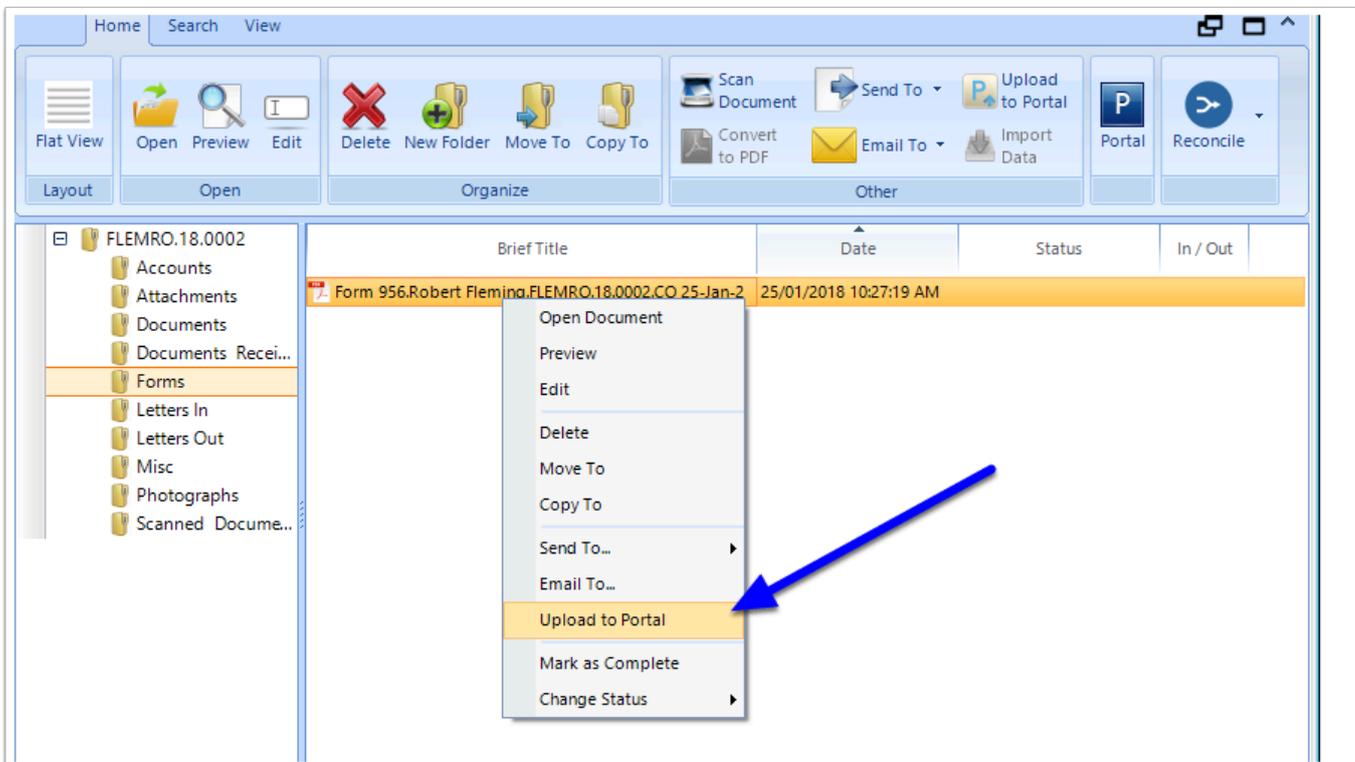
## 2. Open the Documents tab

Now go to the *Documents* tab of the matter from which you want to send the merged Form and navigate to the *Forms* folder.

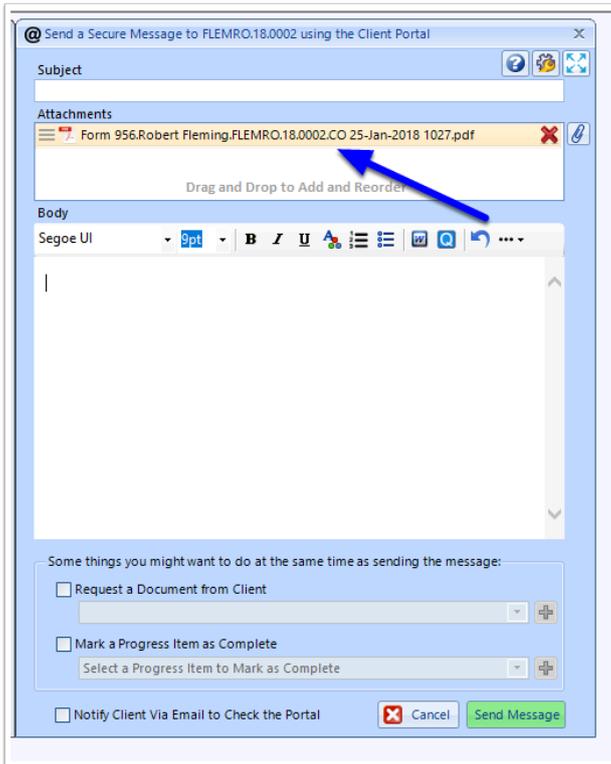


### 3. Select the Form, Right Click and select Upload to Portal

After you have selected the Form you wish to send via the Portal, right click it and from the context menu choose Upload to Portal.

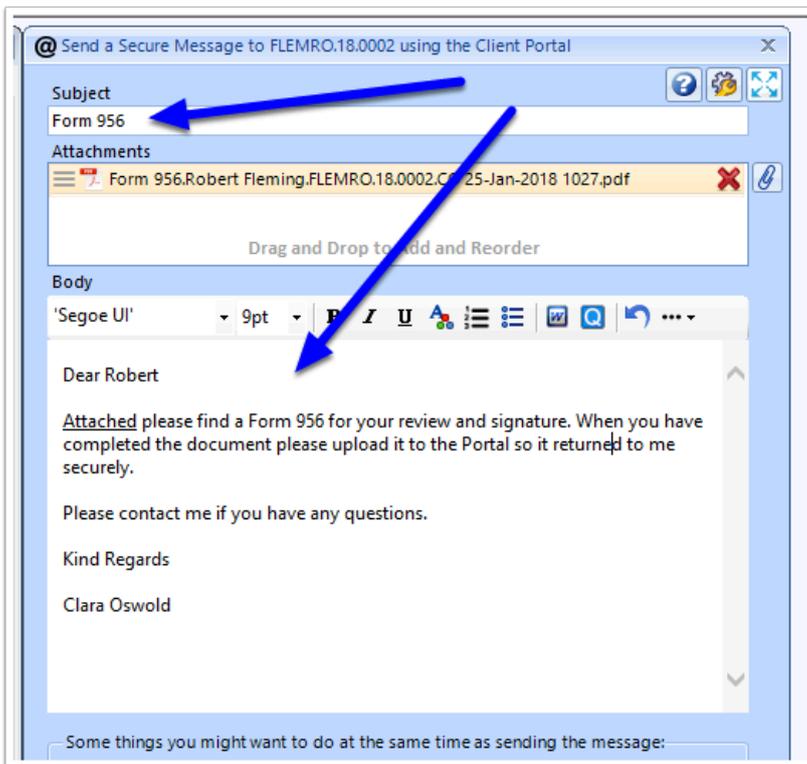


A Portal Messaging window will now appear and in the attachments selection there will be a list of the items you have selected listed.



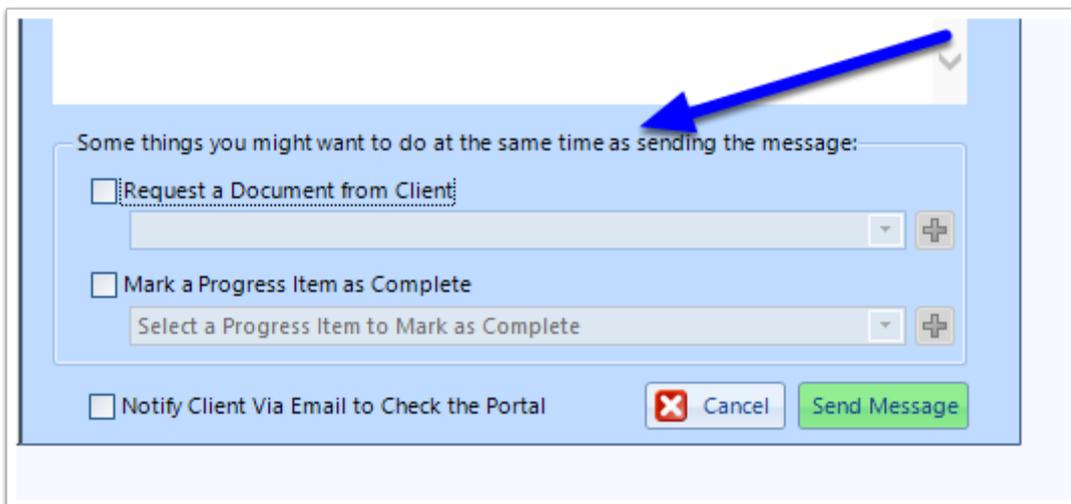
## 4. Add a Message/Instructions

To send the message to your Client with the attached documents, give the Message a subject and insert any relevant instructions in the body of the message.



## 5. Select additional options

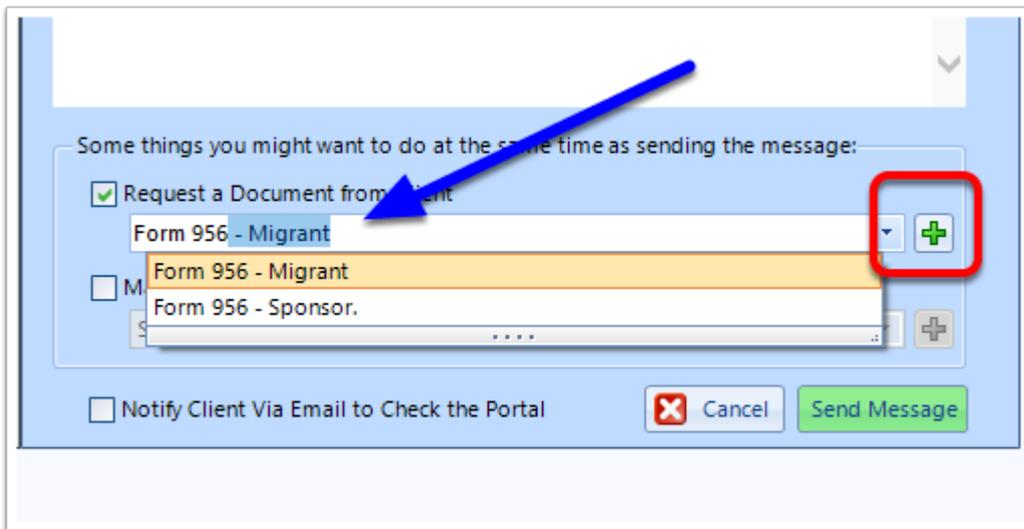
When you upload a message and a Document/Form to the Portal, you can elect for additional things to occur:



### 5.1. Request a Document from Client

This option allows you to also to request a document back from the Client via the Portal. This request will be linked to an item in the *Progress* tab for this matter. To find the relevant item in the *Progress* list that you wish to link to you can:

1. Use the dropdown list which will show a list of all documents/forms currently show on this matters *Progress* tab; or
2. Use the + button to create a new document/form entry on the *Progress* tab for this matter.



Some things you might want to do at the same time as sending the message:

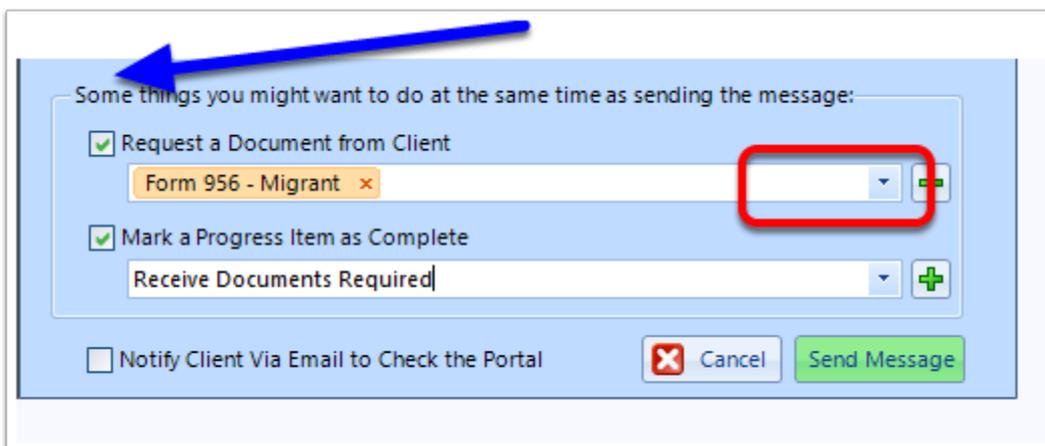
- Request a Document from Client
  - Form 956 - Migrant
  - Form 956 - Migrant
  - Form 956 - Sponsor.
- Mark a Progress Item as Complete
- Notify Client Via Email to Check the Portal

Buttons:

## 5.2. Mark a Progress Item as Complete

This option allows you to also to mark a task on the *Progress* tab for this matter as having been completed. To find the relevant item in the *Progress* list that you wish to mark as complete you can:

1. Use the dropdown list which will show a list of all tasks currently show on this matters *Progress* tab; or
2. Use the + button to create a new task entry on the *Progress* tab for this matter.



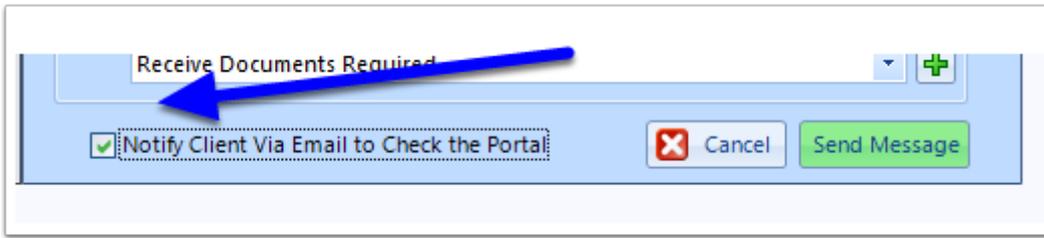
Some things you might want to do at the same time as sending the message:

- Request a Document from Client
  - Form 956 - Migrant
- Mark a Progress Item as Complete
  - Receive Documents Required
- Notify Client Via Email to Check the Portal

Buttons:

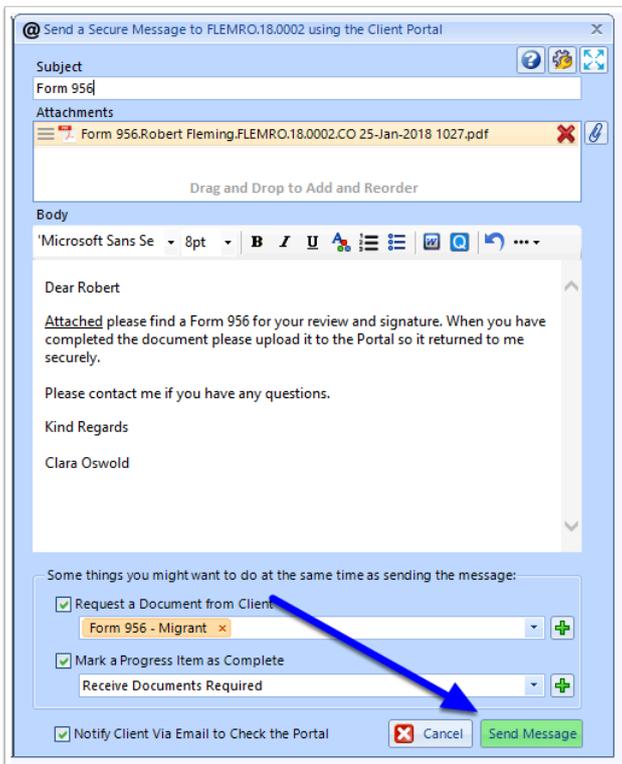
## 5.3. Notify Client that New Documents are Available

Selecting this option will generate an Email to the client to notify them that you have uploaded a document to the Secure Client Portal for them to review.

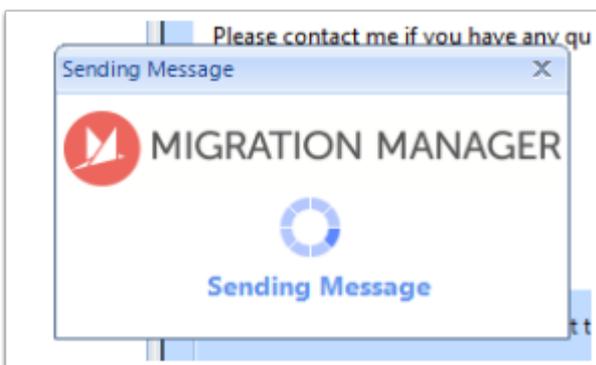


## 6. Click Send Message

To finish, click the 'Send Message' button.



The message and its attachments will now be sent to the Secure Client Portal.



## 7. Send notification email

If you have selected the option to Notify Client, Migration Manager will also generate an email for you to review and send to the Client to notify them that you have uploaded documents for their review.