

Adding a Relation to a Matter

After you have created a Matter, you may wish to manually add additional relations to the Matter. These people may be family included in the Application, or non-migrating relatives, acquaintances etc.

i Note: If you import a questionnaire completed by the client, then all relations in the Questionnaire will automatically import into Migration Manager. The below procedure is how to manually create additional relative records.

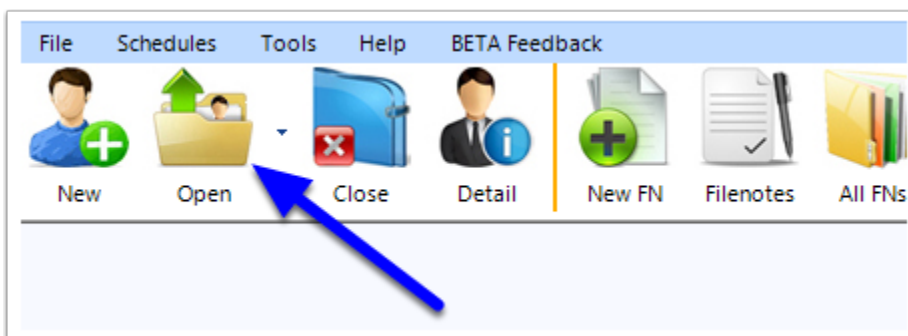
There are 2 methods of creating Relations on a Matter:

1. Creating an 'Included in Application' Relation from the Cover Page

These Relations will automatically be included in the Application

1.1. Open the Matter.

- Click the **Open** button on the *Main Toolbar* and select the Matter.



1.2. Click the Add button.

- On the *Cover Page*, click the **Add** button in the lower right corner.

Client Detail: FLEMSU.19.0001 - Fleming, Susan

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

File Name: Fleming, Susan Jane

Contact Person

Use Primary Applicant's Details ☒ Select Contact

Surname Fleming

Given Names Susan Jane

Preferred Name Susan Prefix

Position

Contact Person Addresses

Physical Correspondence Overseas

Country Area Number

Home Telephone

Work Telephone

Fax

Mobile/Cell

Preferred E-mail

Alternative E-mail

Summary Filenote

Open Filenote Reminder Add to Outlook

Click here to add new note

File Status Client

Referral/Source

Last Contact No Date Set Reset Today

Intended Lodgement No Date Set Reset

Alternative Ref More

Category

Matter Type

Stream

Description

Fee Ex Tax Deposit Est Time

Sponsor GoTo

Applicant's Full Name	D.O.B.	Relationship to Main Applicant	GoTo
Susan Jane Fleming		Primary Applicant	GoTo

Refresh

1.3. Complete the new Applicants section.

When the *Add Applicant* window appears, complete the required fields, then click **Save & Close** (or **Save & New** if you wish to add more relatives).

Add Applicant - FLEMSU.19.0001 - Fleming, Susan

Surname Fleming

Given Names Robert James

Preferred Name Robert Prefix Me

Date of Birth 12/01/1980 Reset Gender Male

Relationship to Primary Applicant Spouse/Partner

Relationship to Primary Applicant's Spouse

Marital Status

Country of Passport

Passport Number

Current Visa Type

Visa Expiry Date No Date Set Reset

Usual Occupation

Highest Level of Education Course Completion Date No Date Set Reset

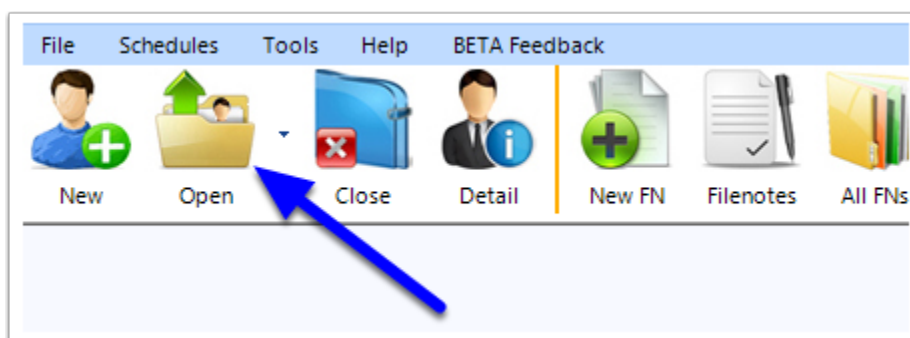
Cancel Save & New Save & Close

i Note: Using this method will automatically include these new people as included applicants. If you wish to add non-included applicants, use the method below.

2. Create a Relation from the Relations tab

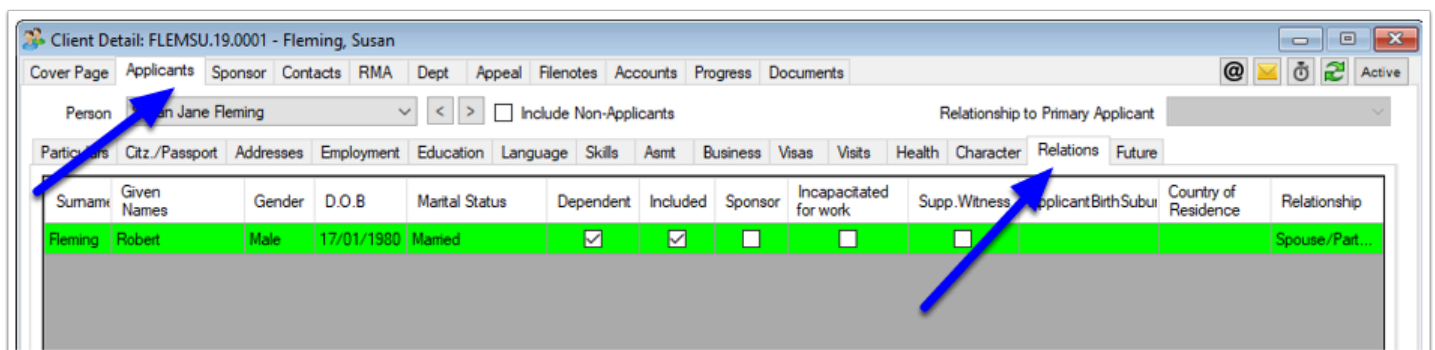
2.1. Open the Matter.

- Click the **Open** button on the *Main Toolbar* and select the Matter.



2.2. Go to the Relations tab.

Select the **Applicants** tab, then the **Relations** sub-tab



2.3. Click Add

At the bottom right of the Relations Grid, click the **Add** button

Client Detail: FLEMSU.19.0001 - Fleming, Susan

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

Person: Susan Jane Fleming < > ☐ Include Non-Applicants Relationship to Primary Applicant


Particulars Citz./Passport Addresses Employment Education Language Skills Asmt Business Visas Visits Health Character Relations Future

Sumam	Given Names	Gender	D.O.B	Marital Status	Dependent	Included	Sponsor	Incapacitated for work	Supp. Witness	Applicant Birth Subur	Country of Residence	Relationship
Fleming	Robert	Male	17/01/1980	Married	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Spouse/Part...

Details Spouse Relationship Details

This person is Susan Jane Fleming's...

Spouse/Partner



2.3.1. Adding a Previously Recorded Person.

If the person has already been recorded in the Matter (as a Relation of another applicant), they will automatically appear in the list of previously recorded people. You can add them as a relation to this person.

1. Click the **Add** box.
2. Select how this person is **related** to your applicant.
3. You can also choose if the person is **Included in the Application** and if they are **Dependent on the Primary Applicant**.
4. Then click **Apply**.

Add Relatives for Susan Jane Fleming

☒ Previously Recorded Person

Add	Relative's Full Name	D.O.B.	How related to Susan Jane Fleming	Is Included In Application	Is Dependant on Primary Applicant	Relationship to Primary Applicant
<input checked="" type="checkbox"/>	Robert Fleming	17/01/1980	Spouse/Part...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Spouse/Partner
<input type="checkbox"/>	Tony Jacobs	11/01/1985		<input type="checkbox"/>	<input type="checkbox"/>	

☐ Other Non-Migrating Person

Surname

Given Names

Gender

Date of Birth

This person is Susan Jane Fleming's...

☐ Family Sponsor

☐ CREATE NEW Family Sponsor File (using the details entered to the left)

Matter ID

Office

☒ CHOOSE EXISTING Family Sponsor File

Note: Since this person is the Family Sponsor, you MUST link this person to a Family Sponsor file. If the Family Sponsor is not shown in this dropdown list, choose "create new" and a new Family Sponsor file will be created and linked automatically.

* indicates mandatory field

2.3.2. Adding a new person to the Matter.

1. Click the **Other Non-Migrating Person** box.
2. Enter the Person's details.
3. Then click **Apply**.

Add Relatives for Susan Jane Fleming

☐ Previously Recorded Person

Add	Relative's Full Name	D.O.B.	How related to Susan Jane Fleming	Is Included In Application	Is Dependant on Primary Applicant	Relationship to Primary Applicant
<input checked="" type="checkbox"/>	Robert Fleming	17/01/1980	Spouse/Part...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Spouse/Partner
<input type="checkbox"/>	Tony Jacobs	11/01/1985		<input type="checkbox"/>	<input type="checkbox"/>	

☒ Other Non-Migrating Person

1 Surname

Given Names

Gender

Date of Birth

This person is Susan Jane Fleming's...

☐ Family Sponsor

☐ CREATE NEW Family Sponsor File (using the details entered to the left)

Matter ID

Office

☒ CHOOSE EXISTING Family Sponsor File

Note: Since this person is the Family Sponsor, you MUST link this person to a Family Sponsor file. If the Family Sponsor is not shown in this dropdown list, choose "create new" and a new Family Sponsor file will be created and linked automatically.

* indicates mandatory field

2.4. Select any Attributes for this person

Once the person has been added, you can select their *row*, then choose certain attributes for that person.

Client Detail: FLEMSU.19.0001 - Fleming, Susan

Person: Susan Jane Fleming

Relationship to Primary Applicant:

Sumam	Given Names	Gender	D.O.B	Marital Status	Dependent	Included	Sponsor	Incapacitated for work	Supp. Witness	Applicant Birth Subj	Country of Residence	Relationship
Fleming	Robert	Male	17/01/1980	Married	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Spouse/Part...
Austin	Jane	Female	10/01/1985		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Sister

Details

This person is Susan Jane Fleming's... Sister

Family Name: Austin

Given Names: Jane

Other Names Summary:

Gender: Female

Date of Birth: 10/01/1985 (Age: 33)

Marital Status:

Deceased: ☐ Date: No Date Set

Citizenships

Town of Birth:

Country of Birth:

Country of Residence:

Citizenship:

Date of Grant: No Date Set

Other Citizenship:

Date of Grant: No Date Set

- ☐ This person is dependent on the Primary Applicant
- ☐ This person is included in the application
- ☐ This person is the Family Sponsor
- ☐ This person is incapacitated for work
- ☐ This person is a Supporting Witness for PA/Spouse Relationship