

How to send a Web Questionnaire

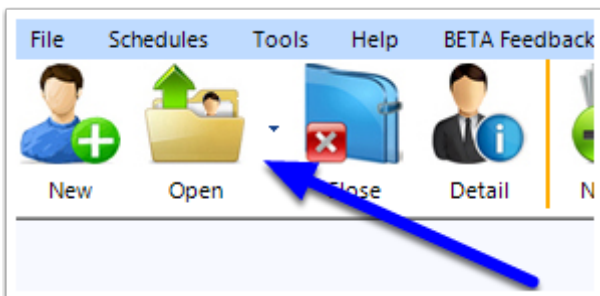
This article covers how to send a Web Questionnaire for completion by your client. The sending of a Web Questionnaire is done via the Portal and as such you must have first activated the Portal for your firm in order to be able to make use of Web Questionnaires.

For instructions on how to Activate the Portal, go to: [Setting Up the Secure Client Portal](#)

! Web Questionnaires are available as of Migration Manager version 8.7.1. Not all Questionnaire types shown in this article are available to all users as at the time of publication.

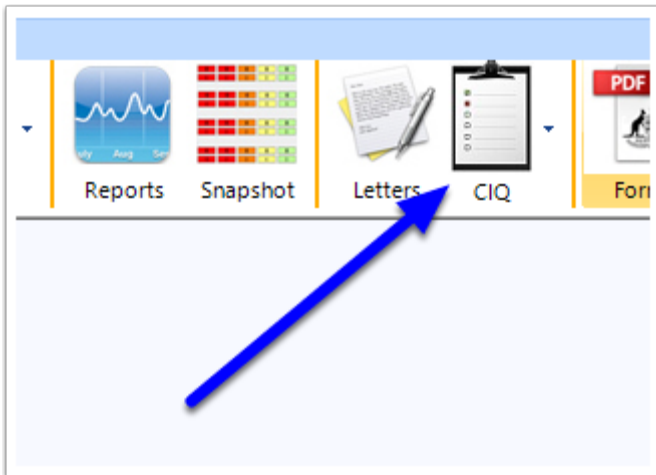
1. Open the matter

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.



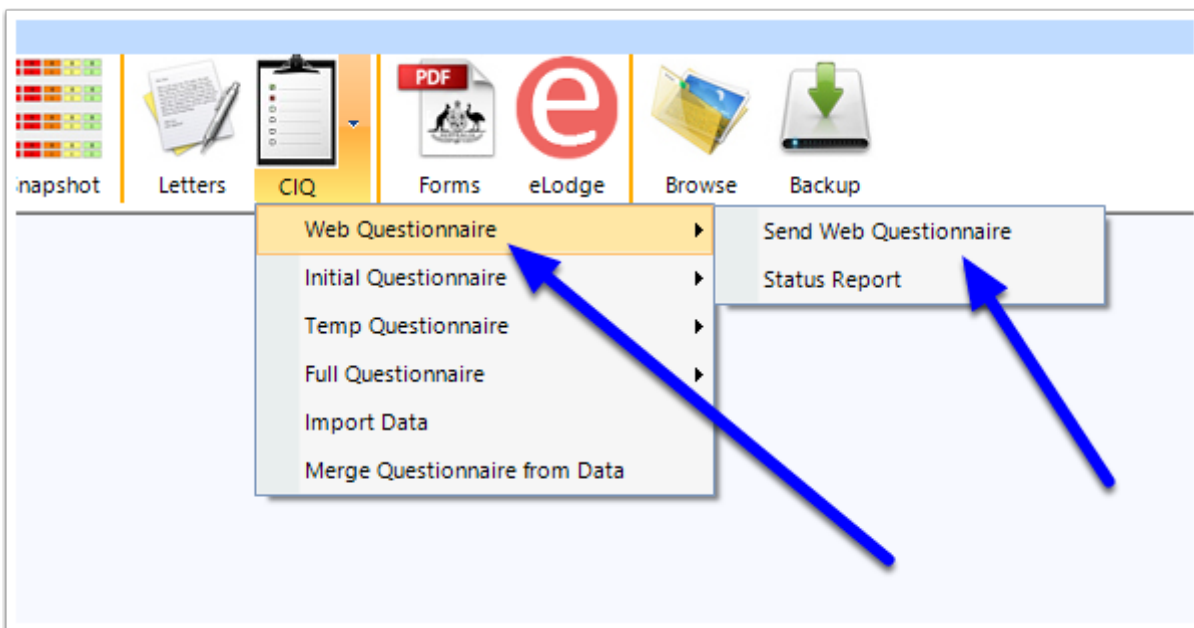
2. Click the CIQ or BSQ Button

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).

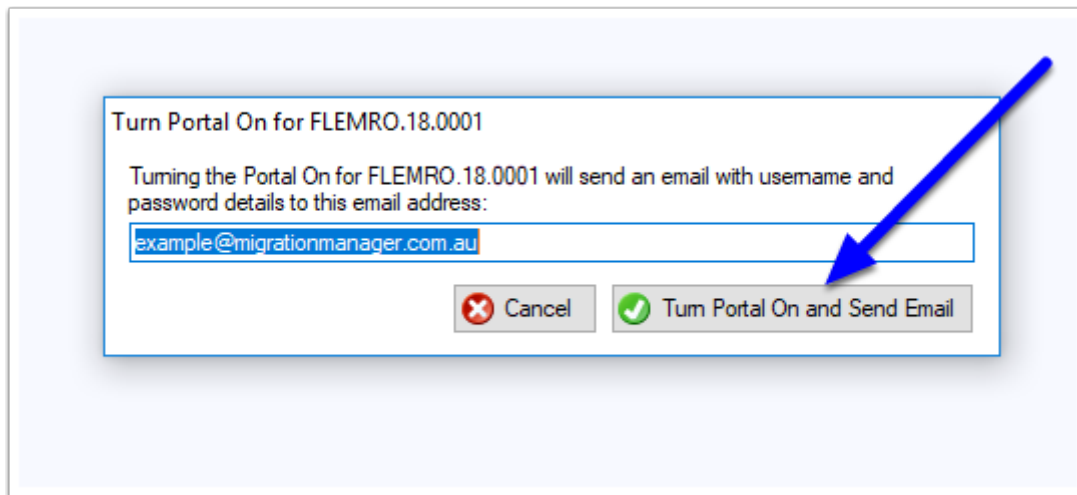


3. Select Web Questionnaire

When you click the CIQ or BSQ button, you will be presented with a number of different types of Questionnaires to choose from. To use the Web Questionnaires, select **Web Questionnaire** and then choose **Send Web Questionnaire**.

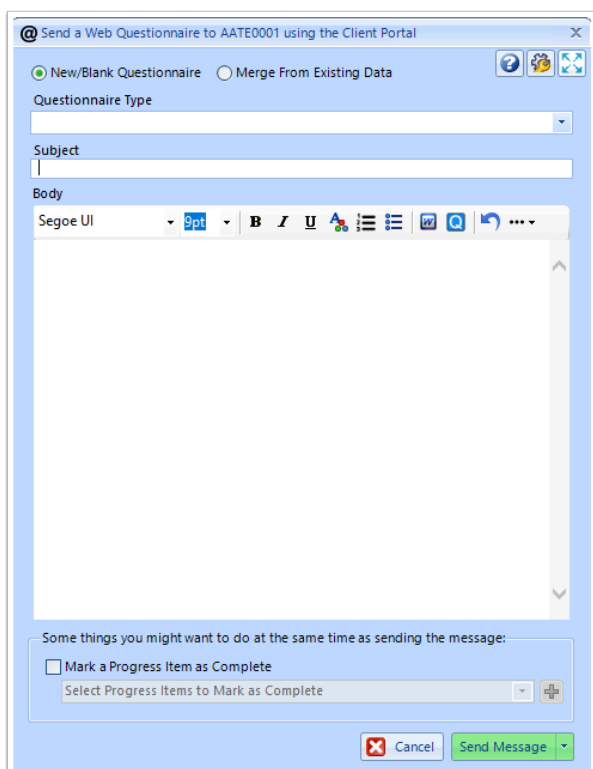


Note that if you not previously activated the Portal for this Matter, you will be prompted to do so at this stage. Check the email address and then click **Turn Portal On and Send Email**. For further details on activating the Portal for a matter please see: [Adding a Matter to the Secure Client Portal](#)



4. Select the Questionnaire Type and Edit Message

A Web Questionnaire message window will now appear. This window is used to select the type of Questionnaire you want to send along with any instructions.



4.1. Set the Questionnaire Type

First you need to select what type of Questionnaire you want your client to complete. To do this, click the **Questionnaire Type** dropdown and then select the relevant Questionnaire.

Send a Web Questionnaire to AATE0001 using the Client Portal

☒ New/Blank Questionnaire ☐ Merge From Existing Data

Questionnaire Type

Family

- Parent (Permanent) Visa Questionnaire
- Partner Visas Questionnaire

Working and Skilled

- Business Visas Questionnaire
- ENS/RSMS Visa Questionnaire
- Graduate (485) Visa Questionnaire
- Graduate (485) Visa Questionnaire - No Form 80
- Skilled (189/190) Visas Questionnaire
- Temporary Activity (408) Visa Questionnaire
- Temporary Work (400) Visa Questionnaire
- TSS Visa Questionnaire
- TSS Visa Subsequent Entrant Questionnaire
- Talent (124/858) Visa Questionnaire
- Talent (124/858) Visa Questionnaire - No Form 80

Student

- Student Visa Questionnaire

Visitors

- Visitor Visa Questionnaire

Form 80

- Form 80 Questionnaire for Over 16 Applicants

Other

- Travel Exemption Questionnaire

☐ Mark a Progress Item as Complete

Select Progress Items to Mark as Complete

Cancel Send Message

4.2. Choose if you wish to Merge from Existing Data.

Web Questionnaires have the ability to pre-populate the Questionnaire with Data already held within Migration Manager. This is useful if a client is returning for a second stage visa and you already have a lot of their details.

4.2.1. Merging from Existing Data

If the Matter you are sending the Web Questionnaire from already contains data, click **Merge From Existing Data**.

@ Send a Web Questionnaire to AATE0001 using the Client Portal

☐ New/Blank Questionnaire
 ☒ Merge From Existing Data

Questionnaire Type
Student Visa Questionnaire

Subject
Online Questionnaire

Body

'Segoe UI' 9pt **B** *I* U A [background color] [bulleted list] [numbered list] [link] [unlink]

Dear Craig

Attached is a link to our secure Online Questionnaire that we require you to complete so that we can obtain the necessary information to prepare your application.

To start the Questionnaire, please click the Open Questionnaire button that

4.2.2. Preview Data to be Exported

If you wish to preview the Data to be exported into the Web Questionnaire, click **Yes**. Otherwise click **No** to continue.

Preview Export Data

Do you want to preview what you will export to the questionnaire

Yes No

4.3. Review/Edit the Subject Line and Message Body

Once you have selected the Questionnaire type, the Subject line and the Body of the message will be populated based on the default Questionnaire Message text that you have set up (for instructions on how to set the default Questionnaire Message text please see: [How to edit a Web Questionnaire Message Template](#)).

To make changes to the Subject Line and Body, click in these fields and type in the required information.

@ Send a Web Questionnaire to AATE0001 using the Client Portal

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Questionnaire Type
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Body

'Segoe UI' 9pt B I U A [List Icons] [Image Icon] [Link Icon] [Undo Icon] [More Icon]

Attached is a link to our secure Online Questionnaire that we require you to complete so that we can obtain the necessary information to prepare your application.

To start the Questionnaire, please click the Open Questionnaire button that appears at the top of this message. As you work your way through the questionnaire please ensure that you follow the instructions on each page and answer every question, providing as much information as you can. If you don't know the answer to a question, you can continue and come back and edit an answer later. You can also save, close, and come back to the Questionnaire at any stage before you submit it. When you get to the end of the Questionnaire, you will be able to review all of the information you have provided. When you have provided all of the information you can, please ensure that you click the Submit button on the last page to send your completed Questionnaire to us.

Please contact this office if you have any queries.

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

☐ Mark a Progress Item as Complete

Select Progress Items to Mark as Complete

Cancel Send Message

💡 Tip: You can use Quickparts to select and use template text to populate your message body. For instructions on how to use a Quickpart see: [How to use Messaging Quickparts](#)

@ Send a Web Questionnaire to AATE0001 using the Client Portal

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Questionnaire Type
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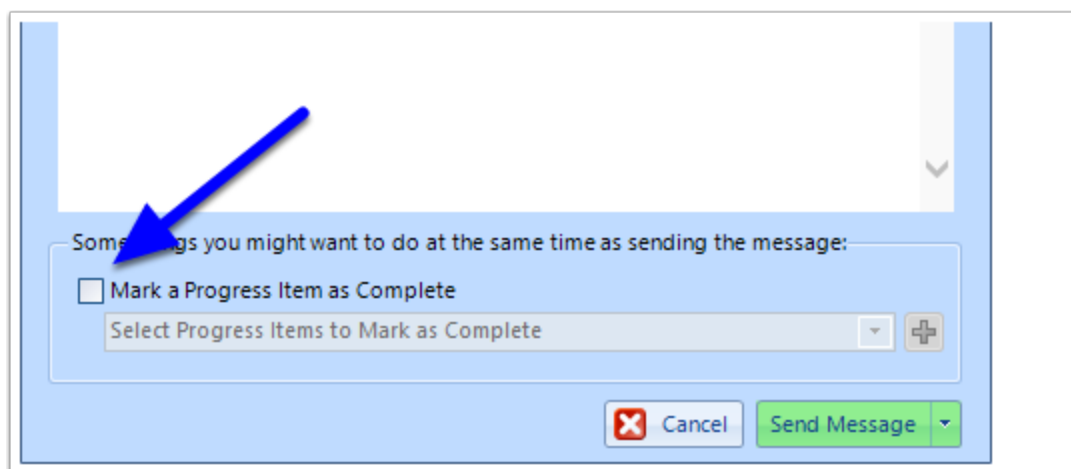
Dear Craig

Attached is a link to our secure Online Questionnaire that we require you to

4.4. Select Additional options

When sending the message, you also have the ability to perform the following task:

- **Mark a Progress Item as Complete** - this control allows you automatically tick off items from the *Progress* tab at the time you send the message. For example, you may have a required activity listed in the *Progress* tab for notifying the client of the decision. That item can be selected from the dropdown. If the activity doesn't exist yet on the *Progress* tab for this matter, then you can create and add a new one by clicking the + button.

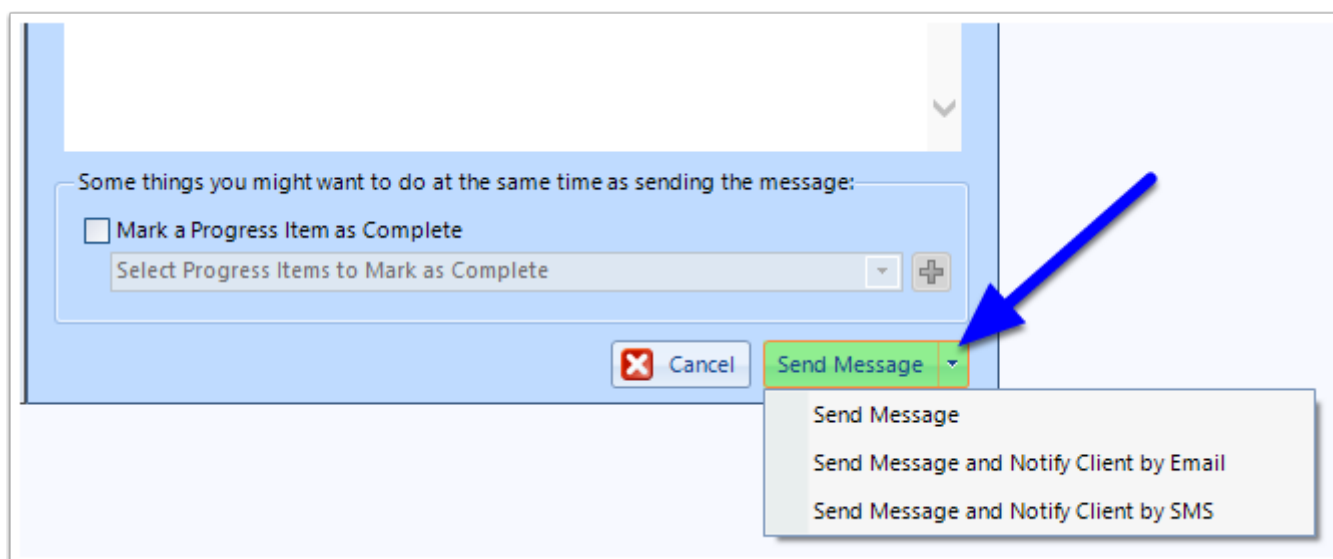


A screenshot of a software interface. A blue arrow points to a checkbox labeled 'Mark a Progress Item as Complete'. Below the checkbox is a text input field with the placeholder text 'Select Progress Items to Mark as Complete' and a dropdown arrow. To the right of the input field is a '+' button. At the bottom of the interface are two buttons: 'Cancel' (with a red 'X' icon) and 'Send Message' (in green).

5. Send Message

To finish, choose how you would like to Send the Message:

- **Send Message** - Will simply send the message with the Questionnaire to the Client's Portal
- **Send Message and Notify Client by Email** - Will send the message and Questionnaire, but will also create an Outlook Email which can be sent to the client to notify them.
- **Send Message and Notify Client by SMS** - If you have [enabled SMS](#), then this will send the message and Questionnaire, but also send a SMS to the client to notify them.



A screenshot of the same software interface as above. A blue arrow points to the 'Send Message' button, which has a dropdown arrow. A dropdown menu is open, showing three options: 'Send Message', 'Send Message and Notify Client by Email', and 'Send Message and Notify Client by SMS'.

The Message will now be sent to your client's Portal inbox.

