# 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: <u>How to Merge a Department Form</u>

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### 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.

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### 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.

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

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### 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.

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Attachments		
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Dear Robert Attached pleas completed the securely. Please contact	e find a Form 956 for your review and signature. When yo document please upload it to the Portal so it returned to me if you have any questions.	u have me
Kind Regards		
Clara Oswold		

## 5. Select additional options

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

– Some things you might want to do at the same time a	as sending the message:	
Request a Document from Client		
		-
Mark a Progress Item as Complete		
Select a Progress Item to Mark as Complete		-
Notify Client Via Email to Check the Portal	Cancel Send	Message

#### 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.

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Some things you might want to do at the same time as sending the message:	
Form 956 - Migrant	
Form 956 - Sponsor.	
Notify Client Via Email to Check the Portal     Cancel     Send Message	je

#### 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 Cancel Send Message	

#### 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.

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Attachments						
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Please contact me	if you have any	questions.				
Kind Regards						
Clara Oswold						
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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.