FREE RESOURCES

Migration Consultation Preparation Checklist

Make your consultation easier to follow.

GENERAL INFORMATION AND ORGANISATION TOOL

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Use this checklist to organise the questions and records you want to discuss with a qualified migration professional. It does not assess your circumstances or establish a client engagement.

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Start using your pack

Who this is for

People preparing for a migration consultation.

Included files

This printable PDF guide with instructions, prompts and blank record forms.

A simple working sequence

1. Save a private working copy before entering personal information.

2. Read the section instructions and the fictional example.

3. Enter your own facts and source references. Leave unknown values blank and explain them in Notes.

4. Use the open-question and review fields for human follow-up.

5. Save a dated version before sharing through an agreed secure channel.

File requirements

Use a PDF reader for this guide. XLSX files need a spreadsheet application that supports Excel workbooks. DOCX files need a compatible word processor. The editable files are not government forms. They contain no macros or automatic submission function.

Important limit

These are general information and organisation resources. They do not assess your eligibility, choose a visa pathway, assess prospects, decide whether evidence is sufficient, complete or submit a government form, review your documents or appoint Okapi as your migration agent. Personalised assistance is agreed separately.

01 Write a short factual summary

Explain what you want help with, your current location and the application or decision involved. Record important dates and identify estimates. Keep the summary brief enough to read aloud. Do not omit an issue because you think it may be unhelpful; accurate information allows the professional to identify the questions that need attention.

Work through these questions

- What do I want to understand?

- What has already happened?

- Which facts are uncertain?

Your working record

Complete the fields below or use the matching editable worksheet. Duplicate the record for additional items.

Topic	
Known facts	
Date or estimate	
Question	

02 Bring the relevant correspondence

Prepare the complete decision, request or application acknowledgement you want to discuss. Include attachments and the original sending email where available. Ask the professional which additional records they need and how to provide them securely. Do not assume an appointment includes a full document review or application preparation.

Work through these questions

- Do I have the whole letter?

- What is the secure intake method?

- What review is included in the appointment?

Your working record

Complete the fields below or use the matching editable worksheet. Duplicate the record for additional items.

Record	
Date	
Location	
Needs secure transfer	

03 Prioritise your questions

List your questions in priority order. Include any deadline, previous refusal, cancellation, inconsistent information or other concern that you need to explain. Ask about the limits of the consultation and the next steps if more work is needed. Record the professional's explanation rather than treating this checklist as a source of legal answers.

Work through these questions

- What must be addressed first?

- What can be considered later?

- What further work may be needed?

Your working record

Complete the fields below or use the matching editable worksheet. Duplicate the record for additional items.

Priority	
Question	
Notes during consultation	
Follow-up	

04 Confirm arrangements and follow-up

Check the time zone, meeting method, fees and cancellation arrangements with the provider. Arrange an interpreter if required and agreed. After the consultation, record the advice received, any limitations, who will do each next action and how further assistance will be agreed.

Work through these questions

- Is the time zone clear?

- Do I need an interpreter?

- Who owns each next action?

Your working record

Complete the fields below or use the matching editable worksheet. Duplicate the record for additional items.

Action	
Responsible person	
Agreed date	
Confirmation	

Worked example and review

Fictional example

Fictional example: Sam prepares five questions but marks the approaching deadline first. Sam asks whether a separate review of a long decision letter is included in the booked consultation.

Use the method with your own records

What is the factual entry you need to record?

What source supports it and what remains uncertain?

What is the next action and who will do it?

Use support and source notes

Scope

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Edition and updates

This is a fixed edition, version 2.0, published 24 November 2026. It is an organisation tool, not a continuously updated statement of migration law. Your purchase includes this edition and correction of defects in the supplied files. New editions, legal updates and ongoing advice are not promised. Check official instructions at the time you use the resource. Download and retain your purchased files.

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Sources and next steps

Official sources

Links are provided to help you find the current official instructions. Government forms and guidance are available free from their publishers. The paid value of this product is its original organisation tools and templates. No government endorsement is implied.

https://www.mara.gov.au/get-help-with-a-visa/help-from-registered-agents

Source links checked 24 November 2026. A working link does not mean every instruction applies to your circumstances.

A practical final review

[ ] Open the files and confirm that you can edit and save a copy.

[ ] Keep original source records separate from working notes.

[ ] Mark estimates and unresolved questions honestly.

[ ] Check the current official instructions for the actual process you are following.

[ ] Use a separate professional consultation for personalised advice or document review.

Contact Okapi

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