FREE RESOURCES

Document Naming and File Organisation Guide

Find the right document and keep its history clear.

GENERAL INFORMATION AND ORGANISATION TOOL

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A practical file organisation method for personal application records. Adapt folder names to your needs and check the current technical upload instructions for the system you will use.

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Start using your pack

Who this is for

Anyone organising application records.

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.