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.

01 Create a folder structure

Use a small number of clear folders: Originals, Working copies, Ready for review and Submitted copies. Add topic folders only when they make retrieval easier. Keep different people and different applications distinguishable. A folder called Ready for review is a working label, not an approval for lodgement.

Work through these questions

- Where are originals kept?

- Can another person understand my folder names?

- Are different applications separated?

Your working record

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

Folder	
Purpose	
Who can access	
Backup location	

02 Name files consistently

Use a consistent pattern such as YYYY-MM-DD Person Document Topic v01. Use the date on the document when known and describe an unknown date honestly. Keep names short enough to read. Avoid passport numbers, passwords, unnecessary dates of birth or other sensitive identifiers in filenames. Retain the source filename in your register when helpful.

Work through these questions

- Does the name identify the content?

- Is the date verified?

- Does the name disclose unnecessary personal information?

Your working record

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

Original filename	
Working filename	
Document date	
Version	
Reason for change	

03 Control versions and submitted copies

Use v01, v02 and later numbers for working versions. Do not overwrite a signed document or a submitted file. When you send a set for review, record its date and exact filenames. Save the final submitted set and its receipt together. If an error is discovered after submission, obtain advice on the correct correction process rather than silently replacing your local copy.

Work through these questions

- Which file was actually submitted?

- Where is the receipt?

- Can I distinguish a draft from a signed copy?

Your working record

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

File	
Version	
Status	
Sent or submitted date	
Receipt location	

04 Check readability and privacy

Open the final file and inspect every page for cropping, rotation, missing pages and unreadable text. Use the receiving system's current file-type and size limits. Keep a backup in a location you control and restrict access to people who need it. Do not place sensitive personal documents in public sharing folders.

Work through these questions

- Are all pages present?

- Can I read names and dates?

- Are access permissions appropriate?

Your working record

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

File	
Page check	
Readability check	
Access check	
Action	

Worked example and review

Fictional example

Fictional example: a scan called scan004.pdf becomes 2026-05-12 Alex Utility Statement v01.pdf in Working copies. The original scan remains unchanged, and the register records both names.

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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Privacy and technical support

Your entries stay in the files you save. These files contain no macros, online submission function or embedded tracking. Store completed copies securely and control who can access them. Product support is for file access and use only. Do not send passports, visa histories, financial records or sensitive case documents through general product support.

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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://immi.homeaffairs.gov.au/help-support/applying-online-or-on-paper/online/attach-documents-to-your-application

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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