FREE RESOURCES

Relationship Evidence Categories Quick Guide

Sort your records without making claims about their legal weight.

GENERAL INFORMATION AND ORGANISATION TOOL

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This guide offers neutral filing categories for relationship records. It is not a mandatory document list and cannot determine whether a relationship meets visa requirements.

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Blaise Itabelo
Registered Migration Agent / MARN 1571548

Start using your pack

Who this is for

People organising relationship 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 Financial records

Use a financial category to group existing records about financial arrangements you wish to discuss or organise. Record the period covered, the names shown and where the original is held. Do not create transactions or accounts to make a relationship appear different from reality. A record may be relevant to more than one topic without needing duplicate copies.

Work through these questions

- What does this record actually show?

- Which period does it cover?

- Where is the original?

Your working record

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

Record	
Period	
Names shown	
Factual description	

02 Household records

Group records of living arrangements and day-to-day household life. Describe the actual arrangement, including periods apart or different addresses. Avoid treating the absence of a particular type of record as an automatic legal problem. Record the facts and seek advice about their significance if needed.

Work through these questions

- What were the actual living arrangements?

- Are dates exact or approximate?

- What source confirms them?

Your working record

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

Arrangement	
From	
To	
Source or note	

03 Social records

Group existing invitations, activities, photographs and contact records by event or period. A caption should identify who, what, where and when without making unsupported conclusions. Respect the privacy of other people appearing in records. Witnesses should describe their own knowledge in their own words.

Work through these questions

- Can I identify the event?

- Do I have permission to share another person's record?

- Is the date verified?

Your working record

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

Event	
Date	
People	
Record location	

04 Commitment and chronology

Keep a factual timeline of significant events and any genuine plans you want to record. Distinguish a plan from something already completed. Note uncertainty openly. This organisation method does not tell you whether the records are enough or how they should be used in a particular application.

Work through these questions

- What happened and when?

- What is a current plan?

- What remains uncertain?

Your working record

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

Event or plan	
Date	
Source	
Uncertainty	

Worked example and review

Fictional example

Fictional example: two people keep one copy of a holiday booking and link it from their chronology and social-record index. The description records the booking facts and makes no claim that it proves eligibility.

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://immi.homeaffairs.gov.au/visas/getting-a-visa/visa-listing/partner-onshore/temporary-820/

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

Okapi Migration Services | Blaise Itabelo, Registered Migration Agent MARN 1571548 | ABN 40 324 452 686 | admin@okapimigrationservices.com | +61 7 5602 4311 | https://okapimigrationservices.com

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