FOR MIGRATION PROFESSIONALS

RMA Client Onboarding Operations Pack

Control the handover from enquiry to an agreed professional engagement.

PROFESSIONAL PRACTICE RESOURCE

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A collection of complementary Okapi resources. See the contents and component descriptions for what is included.

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Start using your pack

Who this is for

Registered migration agents and migration practices.

Included files

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

An editable XLSX workbook with one worksheet for each working section.

Editable DOCX planning or practice templates for the working sections.

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

For migration professionals and their authorised practice staff. These operational templates require adaptation and professional judgement. They contain no legal advice, approved service agreement, legal deadline calculation or assurance of compliance. The responsible professional must check current obligations and approve any client-specific use.