Australian Government
Department of Home Affairs

Australian
BORDER FORCE

Travel Exemptions Portal User Guide

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Note: Clients are able to upload a maximum of 25 attachments to a travel exemption request, however any attachments uploaded by Home Affairs/ABF staff do not count towards this limit. 28
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Purpose and scope

The Travel Exemptions Portal (the Portal) is used to process online travel exemption request forms submitted through the Department's website.

This document provides an overview of Portal functionality applicable to travel exemptions processing, and is a useful resource for new staff to familiarise themselves with the Portal. It details common functionality that is not fully described in any other procedures.

For some tasks more than one functional pathway is available to reach the same result. Where a task has multiple pathways, this document describes the least complex / most efficient option.

Advanced portal functionality, which is only available to specific teams or supervisors, will be covered elsewhere.

This purpose of this document is to illustrate the Portal's functionality to record exemption request assessments, and does not describe any travel exemption processing procedures or policy information. This document should be read in conjunction with the documents noted in Resources below.

Resources

The following documents describe Portal processes specific to exemptions processing. All documents listed are accessed via the Border Measures SharePoint site -
22(1)(a)(ii) [redacted]

- Inwards Travel Exemptions Process Guide
- Outwards Travel Exemptions Process Guide
- Data fixes policy (correcting errors in processing)

Obtaining user access to the Portal

Obtain a list of the Portal groups you need to be assigned to in the Portal from your supervisor (groups are listed in the Border Measures On-boarding guide (ADD2021/567855).

Submit an access request via ABF Traveller Exemption Portal (TEP) Access Management in Connected Services.

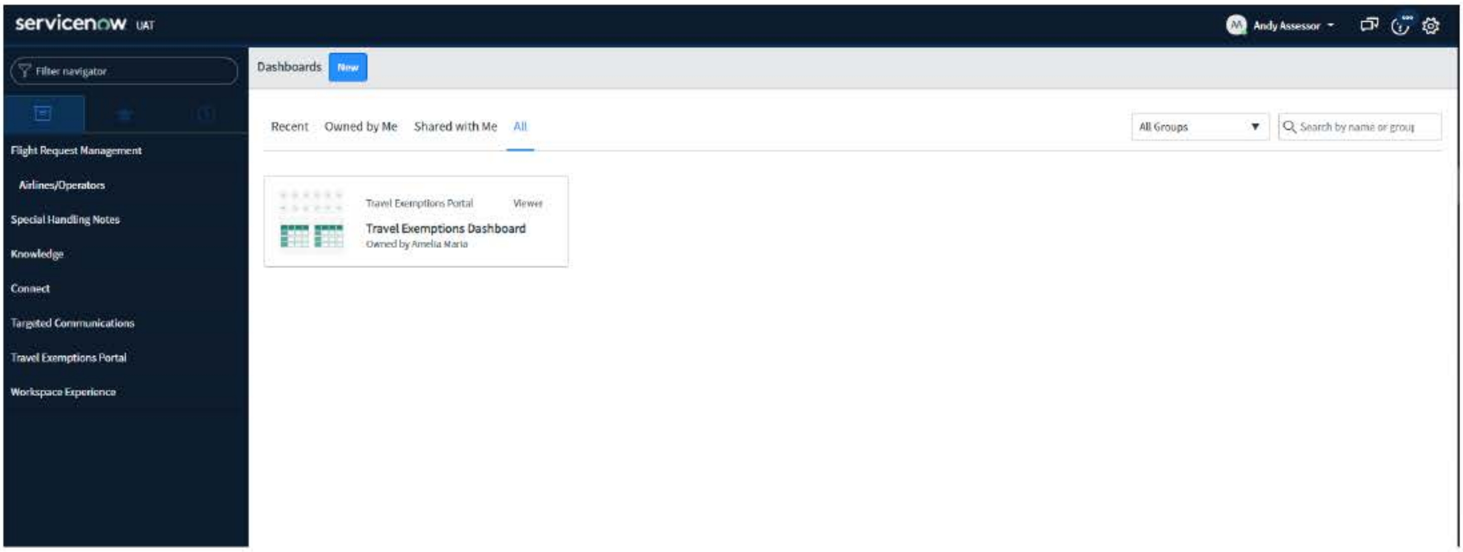
Login to the Portal

Once you have been provided with your user name and password, navigate to the Portal login page at 22(1)(a)(ii) [redacted].

Important: You must use Edge Chromium or Google Chrome to access the Portal. If you try to log in using Internet Explorer your account will be locked and require IT to reset.

After you have logged in and changed your password on first use, you will be presented with the Portal platform view:

The Portal platform view

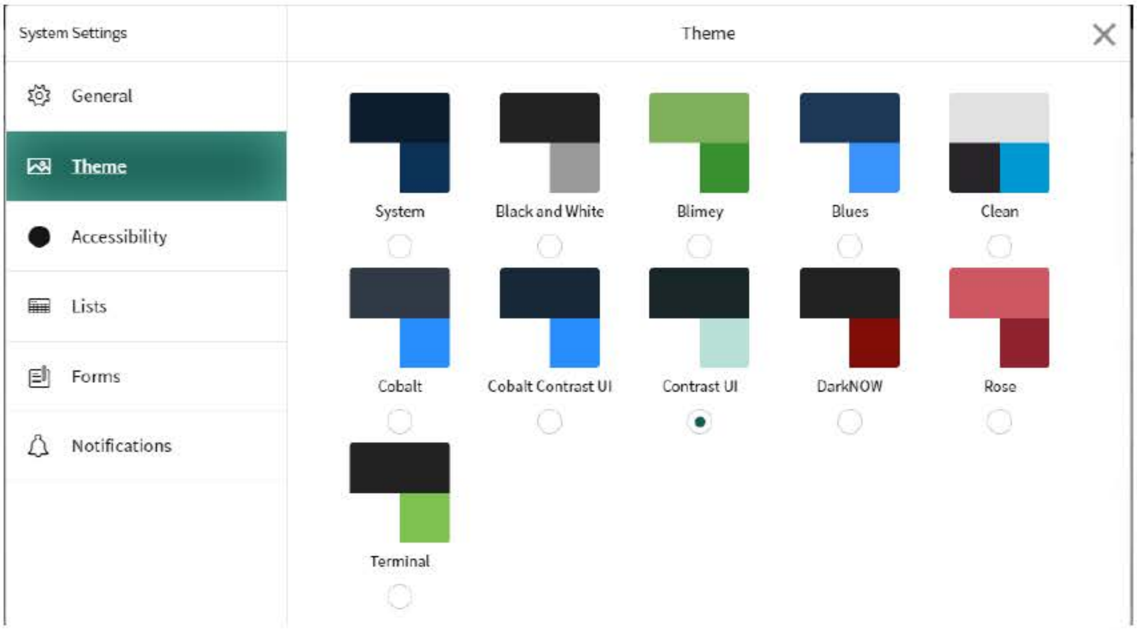


Travel exemptions processing is carried out in the TEP Workspace and you will normally not need to spend much time in the platform view. However a number of settings can be changed in this view, which may be useful.

Change the platform view Theme

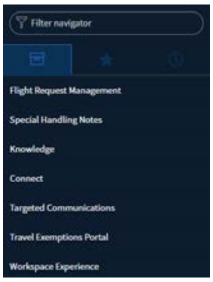
If you want to alter the look and feel of the Portal platform view, you can change the theme.

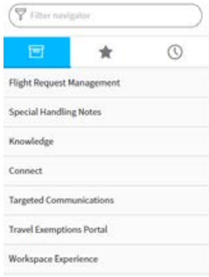
Click on the ⚙ icon in the top right of the screen to display system settings. Select 'Theme' from the menu:



Selecting the *Clean* theme may make the navigator panel on the left of the screen easier to read. You can change this setting at any time:

Default theme ***'Clean' theme***



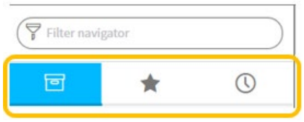


We do not recommend changing any settings except for the theme (if required).

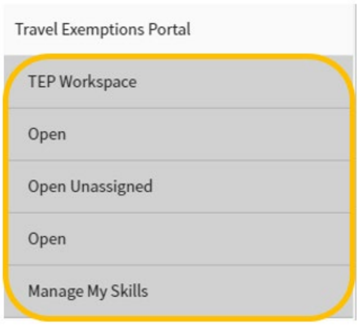
Note that changes to the Platform view do not carry to the TEP Workspace. It is not possible to change the look of the TEP Workspace.

Platform Navigator pane

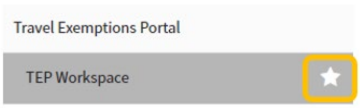
The navigator pane has three folder icons, representing (from the left) – *All applications*, *Favourites*, and *History*:



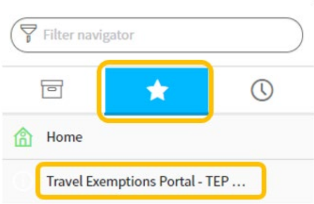
Most options in the *All applications* menu can be expanded to reveal further options. Click on any application (app) to reveal its sub-menu:



You can add any app in the *All applications* menu to your *Favourites* folder by clicking on the star icon next to the app:

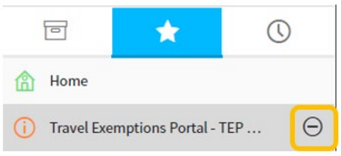


The app will now display in your *Favourites* menu (you may need to hover over the app to see its name in full):



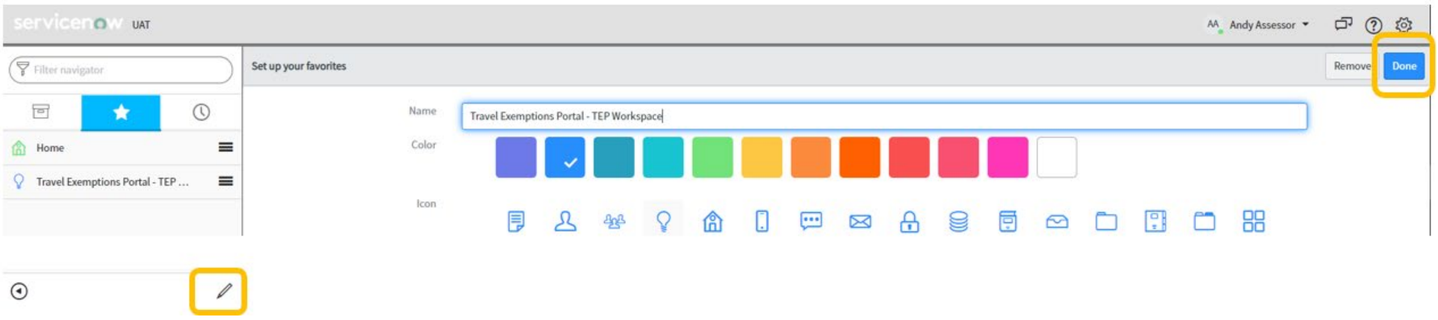
It is recommended to add the TEP Workspace app to your *Favourites* menu.

To remove an application from *Favourites*, hover over the app name to reveal a ‘No entry’ button. Click this to remove the app from your *Favourites* menu:



Change the look of your Favourites menu

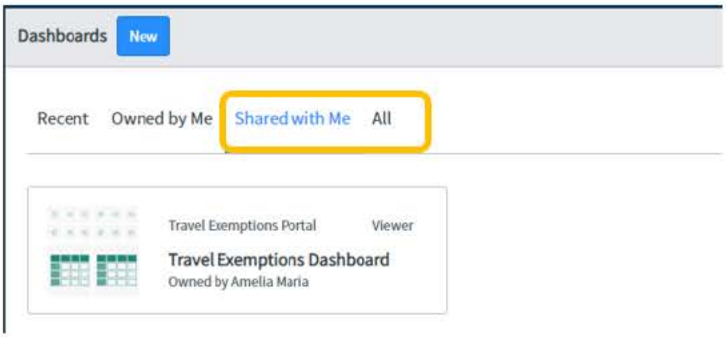
You can change your favourite apps’ icon style and colour in the menu, and reorder your *Favourites* list, by clicking on the ‘Edit’ icon at the bottom of the panel:



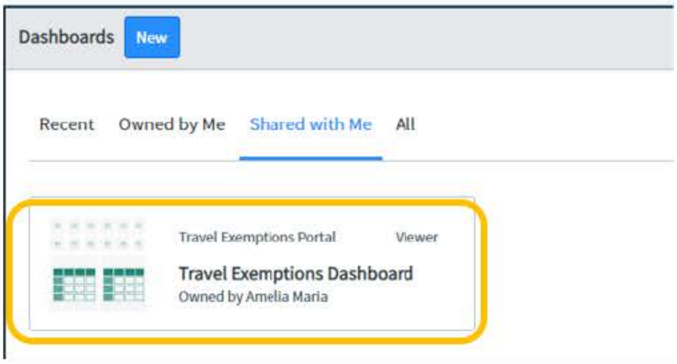
Make any changes then click ‘Done’ when you have finished set-up.

Select your platform home page default view

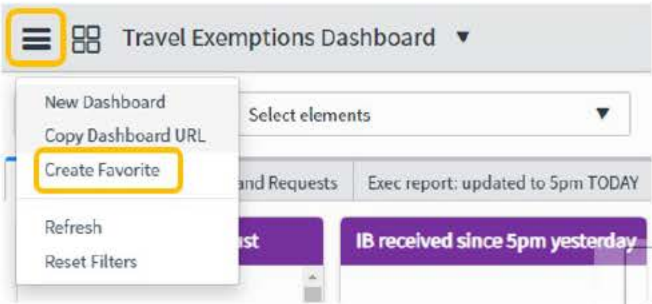
When you login, the main screen defaults to *Dashboards*, where you can view any dashboards that have been shared with you by clicking on 'Shared with Me' or 'All'.



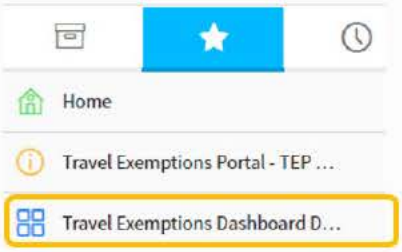
You can change your home page so that it opens directly in to your favourite dashboard when you first login. Click on the dashboard you want to see on first login to open it:



Click on the three lines to display the dashboard menu. Click 'Create Favourite':



This will add the dashboard to your *Favourites*:



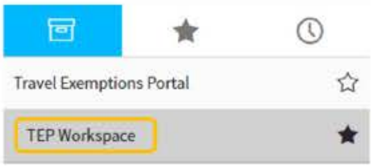
Now when you login your homepage will show this dashboard. This is also the view displayed whenever you click on the Home app in your *Favourites* menu.

Note that if you have multiple dashboards saved to your favourites, your home page will default to the most recently opened dashboard (of your saved favourites).

The TEP Workspace

Travel exemptions are processed in the TEP Workspace (the Workspace). Navigate to this page from platform view by clicking on the app in your *All applications* or *Favourites* menu (if you have made it a favourite):

All Applications:



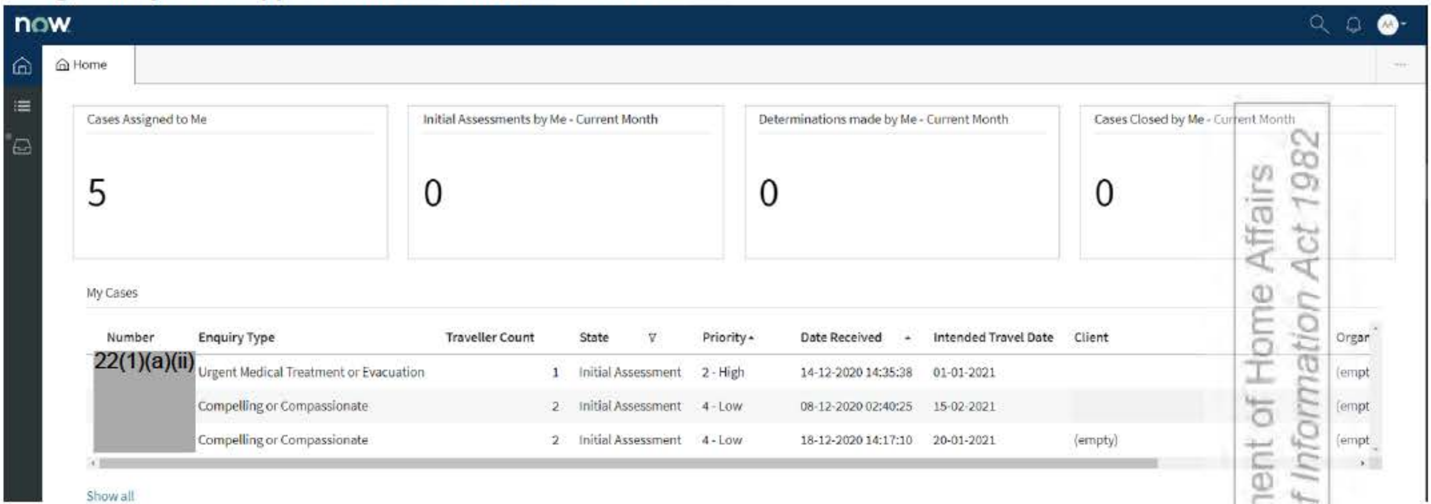
Favourites:

The Workspace will open in a new tab and always defaults to your personalised Workspace home page.

There are three buttons in the Workspace menu bar – 'Home', 'Lists' and 'Inbox' (not currently used). Click on any of the icons to navigate to the relevant screen.

The Workspace home page

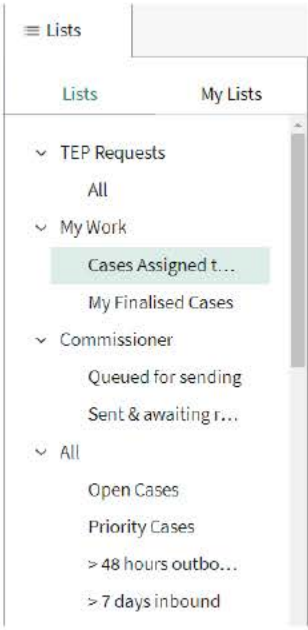
The Workspace home page shows useful summary statistics about your work. Any travel exemption requests assigned to you will appear in the list below these stats:



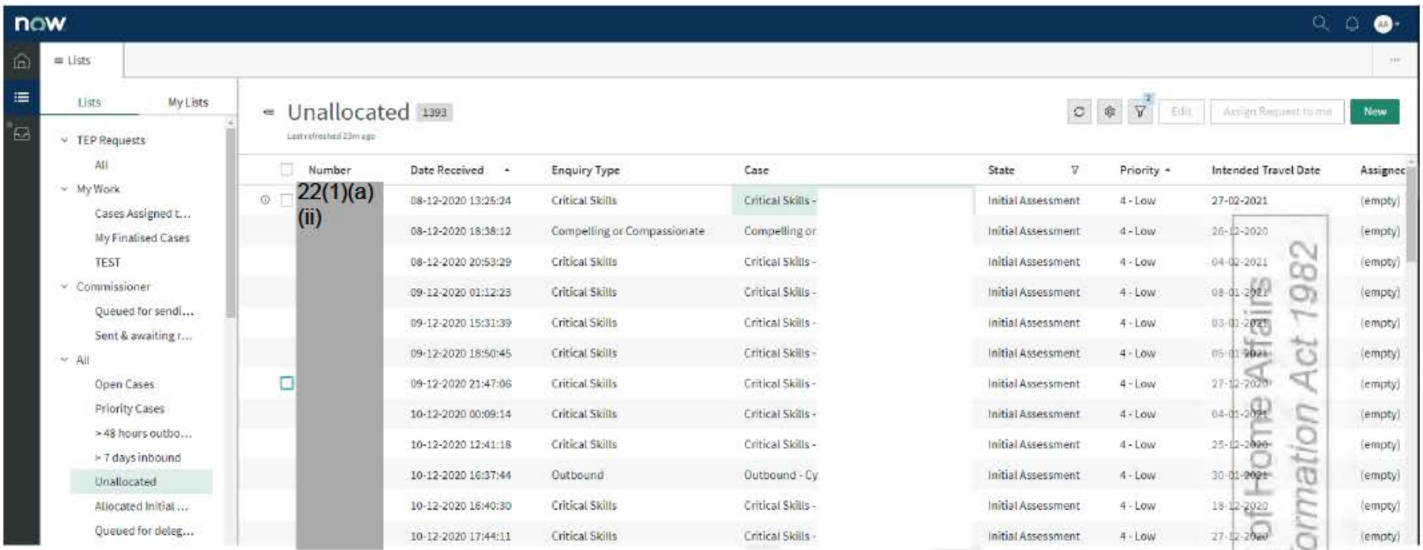
Lists have a set default sort order, so any requests newly assigned to you may not appear at the top of your list. You can temporarily change the sort order of your list – see **Sort a list**.

Workspace Lists

Lists are created by Business Admins or advanced users to assist with exemption processing management and administrator functions. Clicking on the 'Lists' button will display the contents of your *Cases assigned to me* list by default. Your supervisor will inform you of any other lists applicable to you.



Selecting any list from the menu will display the contents of the list:



The 'My Lists' tab should not be used by processing staff.

List view functionality

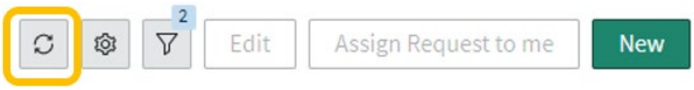
A number of basic tasks can be undertaken within the list view without having to enter a request record:

- Refresh a list
- Sort a list
- Filter the contents of a list
- Preview request details
- Assign one or more requests to yourself

Additional functionality is available to Business Admins or advanced users.

Refresh a list

To check whether the contents of a list have changed since you opened it, click the 'Refresh' icon:



Sort a list

You can manually sort a list based on any of the column headings. To sort a list, click on the heading of the column you wish to sort on. Once sorted the header will display an arrow to show in which order the contents are displayed (low to high or high to low):

Note that a manual sort only applies to your current view, and will only remain while you have the list open. When you exit the list it will revert to the default sort order when you next open it.

Filter the contents of a list

Each list can be manually filtered so that it will temporarily display only the requests you wish to see. Note that a manual filter only applies to your current view and will only remain while you have the list open. When you exit the list the filters are removed and will need to be re-applied when you next open the list if required.

To filter a list:

1. To display the filter window, click the filter icon in the column header you want to filter:

2. Select the desired filter parameter(s) and click 'Apply' – your list will now show the requests that meet the filter parameter (in the case below, only requests of enquiry type *Immediate Family*):

3. You can filter on multiple columns; for example you can select to display all Immediate Family requests that were received on a specific date (filtering by *Enquiry Type* and *Date Received*).

Note that some columns have additional useful filter conditions; for example you can search for either a specific date, or a date range.

Preview request details

You can preview the information provided in a request, and any activity recorded on it, from a list. Hovering over the blank space to the left of a TER number will display an Info icon. Click on this to display a preview of the request details on the right side of your screen:

You cannot preview the traveller records or attachments, however a traveller summary is included in the request preview.

Assign work to yourself

Note for clarity: 'Un/assigned' is used in this document except when referencing list names which use 'Un/allocated'. Both terms have the same practical meaning as each other here.

Check with your supervisor how new requests are allocated in your team. You may be assigned requests, or you may need to assign requests to yourself. If you need to assign unallocated work to yourself, be aware that there are separate Unallocated lists under most categories in the Lists pane, so ensure you assign work to yourself from the Unallocated list under the correct category.

You can assign requests to yourself irrespective of which list they are in, the request's processing state, and whether or not the request is assigned to someone else.

There are two methods to assign a request to yourself depending on whether the request is currently unassigned. The following is actioned from the List view:

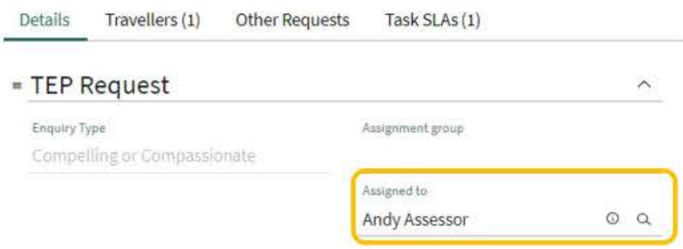
Assign one or more unassigned requests to yourself from the List view

You can only assign unassigned requests to yourself using this method (i.e. you cannot re-assign requests already assigned to someone else, and you cannot assign requests to other people, using this method).

1. Click on the relevant Unallocated list to display all of the unassigned requests in it.
2. Hovering over the blank space to the left of a TER number will display a tick box. Click on this to mark a request and repeat for all requests you wish to assign to yourself:

3. The 'Assign Request to me' button will become active. Clicking on this will assign all marked requests to yourself:

The request(s) will be added to your *Cases assigned to me* list, will display under *My Cases* on your Workspace home page, and your name will appear in the *Assigned to* field in the request record:



TIP *– You can preview a Request record from a list by clicking on the "i" symbol to the left of the TER number.*

Work allocation warning

If any requests you have selected are already assigned to another processing officer, the following warning will be displayed and those requests will not be reassigned to you:

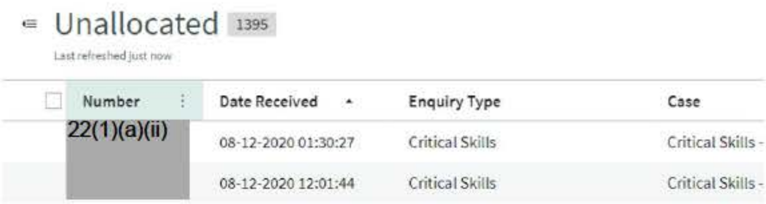
If you need to re-assign an already assigned request, follow the instructions below.

Assign a request to yourself from a Request record

In a Request record you can:

- Assign an unallocated Request to yourself
- Re-assign a Request that is assigned to somoene else
- Re-assign a Request to someone else

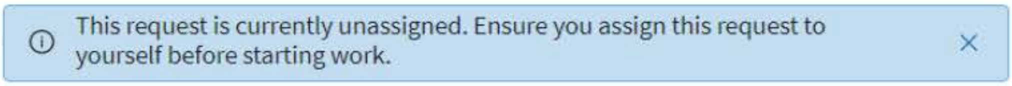
1. Click on the relevant Unallocated list to display all of the unassigned requests in it.
2. Open the request you wish to assign by clicking on the TER # hyperlink:



3. To assign the request to yourself, click on the ‘Assign to me’ in the Action button bar:

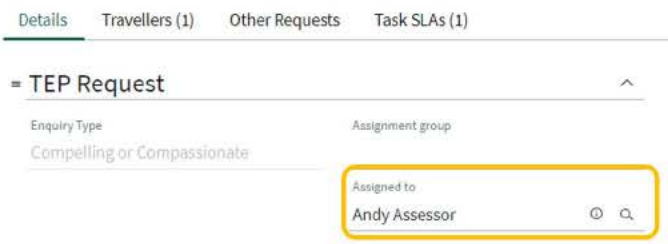
Work allocation warning

The system will display the allocation status of the request when you open it, or if someone else reassigns it while you have the request open. Unassigned message:



If a request is assigned to someone else:

In addition, the request details page shows who it is assigned to:



Occasionally you may open an unassigned request, but someone else may open it and assign it to themselves before you do. In this situation you will see the ‘record assigned to someone else’ message, but the *Assigned to* field in the request will still be blank.

If this warning appears but the *Assigned to* field is blank, refresh the page to update this field:

If you wish to let the other officer process the request, exit from the request without assigning it to yourself.

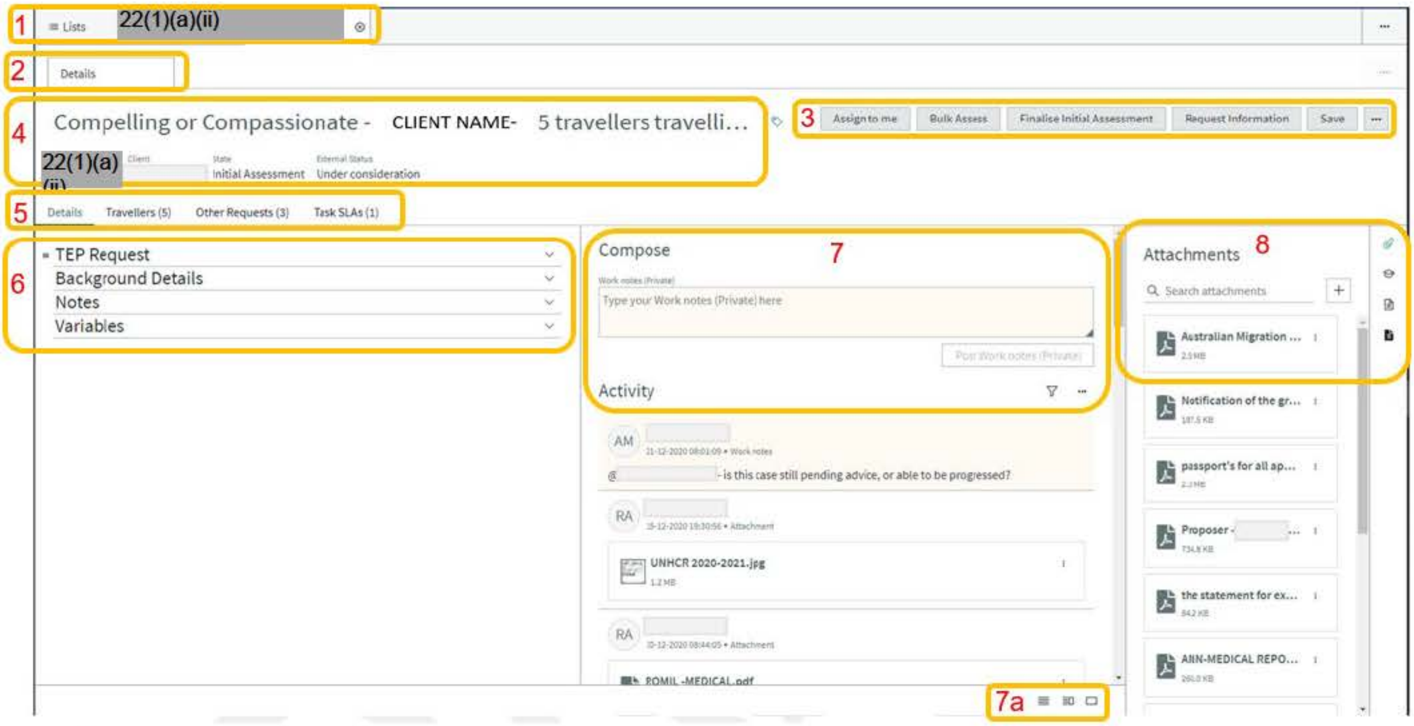
If you wish to process the request you will need to contact the other processing officer to prevent double handling before clicking Assign to Me. You will be asked to confirm the action; click ‘OK’ to complete the task.

Your name will now appear in the *Assigned to* field in the request, the request will be added to your *Cases assigned to me* list, and it will display under *My Cases* on your home page.

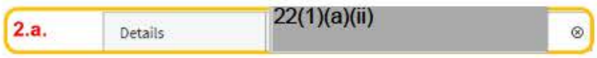
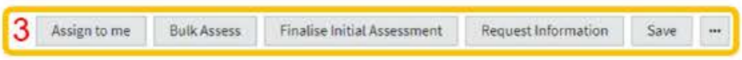
The Travel Exemption Request record

To open a travel exemption request record from any list, click on the TER number hyperlink (hyperlinks are indicated by blue text). This will open the request in a new tab displaying the TER number (1 below). Click on any of the tabs at this top level to navigate between them.

Clicking on any request (TER number) tab displays the request record:



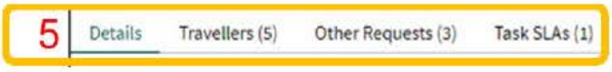
Field descriptions:

Name	Purpose
 Request navigation sub-tabs:	 Used to navigate through information related to a single request. When you open a request the view will default to the request Details sub-tab (Note that this tab may also show the request TER number, depending on how you opened the request). Clicking on any hyperlinks within a request record will open a new sub-tab alongside the Details sub-tab (2.a. In the above example, two of the traveller (TEP#) records attached to the request have been opened). This allows for easy identification of, and navigation between, the request and other records related to that request.
 **Action bar buttons:**	These buttons are used to progress a request through processing. Clicking the ··· icon on any screen displays additional menu items. Refer to the **Action bar buttons** section in this guide to see a description of each button's function.

Name	Purpose
2 Details	2.a. Details 22(1)(a)(ii) ⊗
Request navigation sub-tabs:	Used to navigate through information related to a single request. When you open a request the view will default to the request Details sub-tab (Note that this tab may also show the request TER number, depending on how you opened the request). Clicking on any hyperlinks within a request record will open a new sub-tab alongside the Details sub-tab (2.a. In the above example, two of the traveller (TEP#) records attached to the request have been opened). This allows for easy identification of, and navigation between, the request and other records related to that request.
4 Compelling or Compassionate - CLIENT NAME- 5 travellers travelli.. 22(1)(a)(ii) Client State Initial Assessment External Status Under consideration	
Request summary:	Displays the request enquiry type, name of the person who submitted the request (the account holder ("client")), who may or may not also be travelling), how many travellers are included in the request, and the current processing state of the request, based on the processing state of the least progressed traveller (the 'slowest moving' traveller*). If you need to know any details about the person who submitted the request, click the *Client name* hyperlink to open the client details in a new sub-tab. The client information page is identifiable as a client because the sub-tab displays the client's name rather than a TEP number (which denotes a traveller record). Client Traveller Details Client name ⊗ 22(1)(a)(ii) ⊗
Number 22(1)(a)(ii) Action status • Needs attention Client 22(1)(a)(ii)	State Initial Assessment External Status Under consideration
Needs attention flag:	Follow up flag that may appear after a request for information (RFI) has been sent to the client. This flag indicates either: • a client has added information (additional comments and/or attachments) to their request through their portal account; or • a client has not provided any information by the RFI deadline. Clicking the Clear Needs Attention button in the Action bar clears the flag and returns the request to its original processing state prior to the RFI being sent.

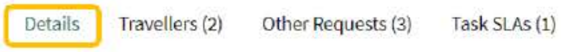
* *Where a request has multiple travellers and those travellers are all at different processing states, the request's state will default to the state of the least progressed traveller. For example if three travellers are at Outcome Notification and one is at the less advanced state of Initial Assessment, the request's state will be Initial Assessment.*

Request info sub-tabs



Use these sub-tabs to navigate to information about the request – to view the details of the request, a request's traveller records, or to view any other requests submitted by the same client.

'Details' sub-tab



Clicking on the Details sub-tab displays information about the request, in the following panels.

Field descriptions:

Name	Purpose
	
Form panel:	Shows all information provided in the online form, and request level processing information. By default, all information under the minimised headings shown is visible (use the down arrows to expand). 'TEP Request' - shows core details: enquiry type, who the request is currently assigned to, request priority and request processing state. 'Background Details' - shows client supplied information about the request including intended travel details, client contact details and the reason for submitting the request. If the request has been referred for discretion, the details of the discretion path are displayed here. If any information in the Background details section is incorrect (e.g. intended travel date), you can change it. 'Variables' - shows all other information provided by the client in the online request form. **DO NOT** amend any variables. 'Notes' - the most recent processing work note recorded in the Activity panel.
	
Activity panel:	'Compose' - used to record notes, which are not viewable by the client. Remember that while the client cannot view these notes, all information in client records is subject to FOI. 'Activity' – automatically records activity on the request created by the client and in processing.

OFFICIAL

Name	Purpose
7a **Panel view buttons:**	Allows you to change the full screen view to show the Form panel, the Activity panel, or both.
 **Documents panel:**	Access the following documents relating to the request (the default view is Attachments). Select one of the icons to display documents: *Paperclip* = (Attachments) attachments submitted with the request *Hat* = (Agent assist) Not currently used *Light Page* = (Templates) Not currently used *Dark Page* = (Response Templates) Opens the CAI template library

'Travellers' sub-tab

Clicking on the 'Travellers' sub-tab provides an overview of all travellers included in the request.

Details | Travellers (2) | Other Requests | Task SLAs (1)

Travellers 2
Last refreshed 1h ago

New

Number	Last Name	First Name	Passport Number	Passport Country	Previous Requests	Australian Visa Status	Visa Subcla
22(1)(a)(ii) [redacted]	Traveller	22(1)(a)(ii) [redacted]			0	Visa Holder	155 - Five Ye
	Traveller				0	Visa Holder	155 - Five Ye

Click on one of the TEP hyperlinks to open the record for that traveller.

'Other Requests' sub-tab

Click on this sub-tab to display a list of all other requests submitted by the same client.

Details | Travellers (2) | Other Requests (3) | Task SLAs (1)

Other Requests 3
Last refreshed just now

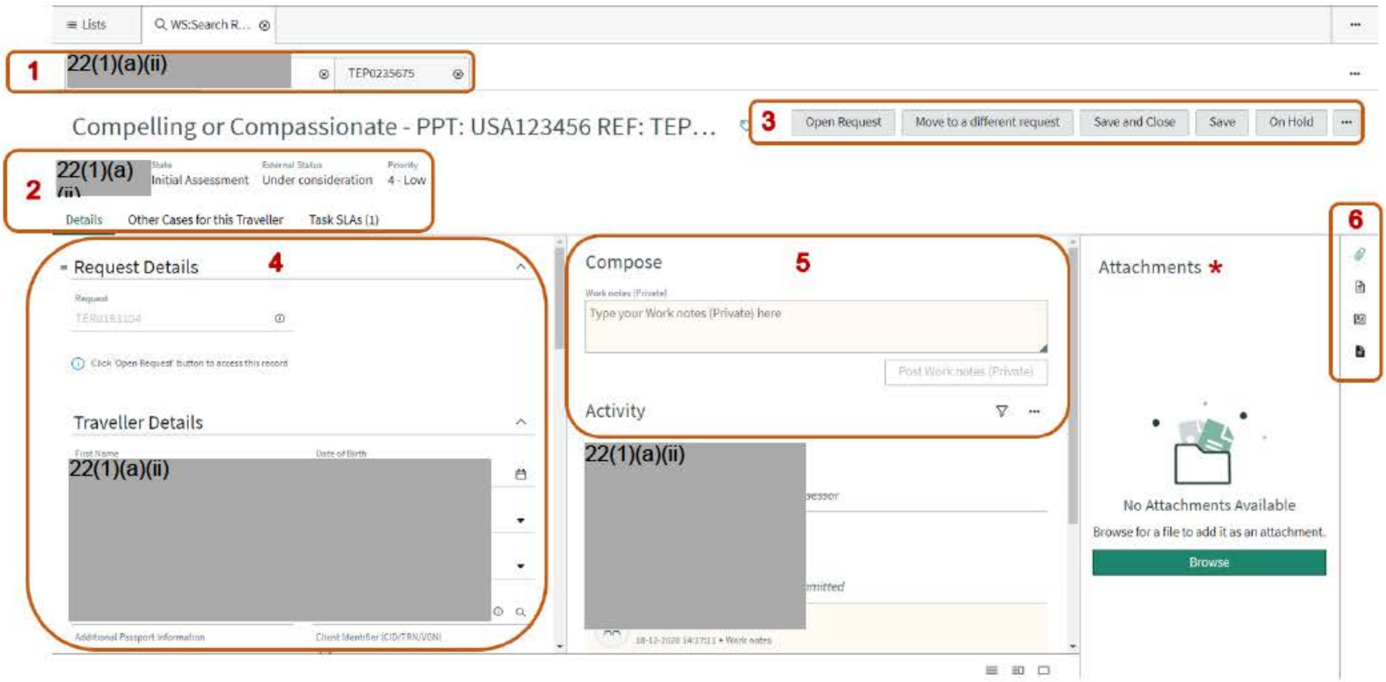
New

Number	Short description	Assigned to	State
22(1)(a)(ii) [redacted]	Compelling or Compassionate - 2 travellers travelling o...	(empty)	Closed
	Compelling or Compassionate - 2 travellers travelling o...	(empty)	Closed
	Compelling or Compassionate - 2 travellers travelling o...	(empty)	Closed

Click on one of the TER hyperlinks to open the request record for viewing.

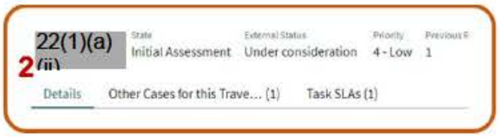
The Traveller record

Clicking on the 'Travellers' sub-tab in a request (or navigating directly to a traveller record) displays the following information:

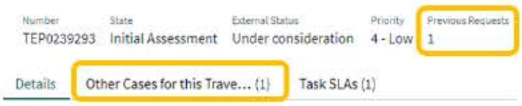


Field descriptions:

Request record navigation tabs: (See **The Travel Exemption Request record**). Use to navigate between all open tabs within a request.



Traveller summary: Shows the traveller (TEP number), the processing state of traveller, priority, any previous requests the traveller has been included in (if applicable) and a sub-tab to navigate to any other cases the traveller has been included in.

<table>
<tr><th>Description</th><th>Purpose</th></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>‘Repeat requests’ indicators:</td><td>The ‘Previous Requests’ flag and ‘Other cases for this traveller’ flag in the traveller summary fields allow processing staff to identify repeat requesters (based on a match to passport number and passport country). Click on the ‘Other cases...’ sub-tab to display those requests.

‘Previous requests’ shows any requests that included the traveller that were submitted before the current request. This figure will not update in the current request if the traveller is included in any future requests.

‘Other cases for this traveller’ will update in the current request whenever the traveller is included in a subsequent request.</td></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>Action bar buttons:</td><td>Processing at the traveller level is done using these buttons.

Clicking the ... icon on any screen displays additional menu items.

Refer to the Action bar buttons section in this guide for a description of each button’s function.</td></tr>
</table>

Traveller info sub-tabs

Details Other Cases for this Trave… (3) Task SLAs (1)

Use these sub-tabs to navigate to information about the traveller – to view the traveller's details submitted in the request, or view other requests the traveller has been included in. The 'Task SLA's' sub-tab is not used in processing.

'Traveller Details' sub-tab

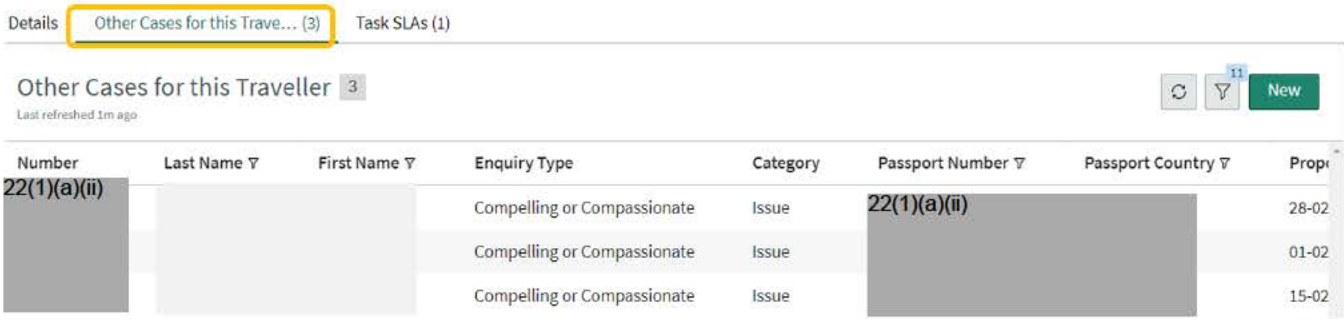
Details Other Cases for this Trave… (3) Task SLAs (1)

Field descriptions:

Description	Purpose
 **Traveller information:**	The full list of headings in this panel is:  'Request Details' - displays the request TER and has no other purpose. 'Traveller Details' - shows the information provided in the online form specific to the traveller. Can be changed if any details, such as PPT number or visa subclass, are incorrect. 'Initial Assessment', 'Border Checks – CMAL' and 'Discretion' are used to record processing information if the 'Bulk Assess' function is not used. 'Notes' and 'Variables' are not used in the Traveller record. Note that legacy records (prior to December 2020) may have information here.
 **Activity panel:**	'Compose' - used to record notes, which are not viewable by the client. Remember that while the client cannot view these notes, all information in client records is subject to FOI. 'Activity' – automatically records activity on the traveller created during processing.
Attachments *	Not used. Attachments are only available in the request, not the traveller record.
 **Documents:**	The documents icons have no function as attachments and templates are available in the request record.

'Other Cases for this traveller' sub-tab

Displays summary information about the traveller provided in any other requests they have been included in.



Details | Other Cases for this Trave… (3) | Task SLAs (1)

Other Cases for this Traveller 3

Last refreshed 1m ago

Number	Last Name	First Name	Enquiry Type	Category	Passport Number	Passport Country	Prop…
22(1)(a)(ii) [redacted]			Compelling or Compassionate	Issue	22(1)(a)(ii) [redacted]	[redacted]	28-02
[redacted]			Compelling or Compassionate	Issue	[redacted]	[redacted]	01-02
[redacted]			Compelling or Compassionate	Issue	[redacted]	[redacted]	15-02

Action bar buttons

The Request record

Button	Purpose
Buttons available in most request processing states	
Assign to me	Assigns a request (and all its travellers) to yourself. A warning will display if the request is assigned to another officer. See **Assign work to yourself**
Request Information	Use this button when you need the client to provide further information. See **Request information.**
Clear Needs Attention	Displays where a request for information (RFI) has been sent *and* the request has a Action status • Needs attention flag. Once any RFI follow-up action has been completed, click this button to clear the flag and return the request to its original processing state. See **Needs attention flag.**
Save	Refreshes the record and saves any changes made without closing the record.
•••	Not all Action bar buttons are displayed individually. The 'more buttons' icon displays all other available actions. For example: Download Attachments Generate Traveller Records Export Travellers Import Travellers from Excel Import Assessments from Excel 'Download Attachments' – downloads all attachments on a request. See Viewing Attachments below. 'Generate Traveller Records' (not used in processing). 'Export Travellers' – exports all travellers on the request to an Excel file. 'Import Travellers from Excel' – Used by Events and Critical Skills teams. 'Import Assessments from Excel' – Used by Events and Critical Skills teams.
Bulk Assess	Enables recording of an initial assessment or discretionary decision for one or more travellers in a request without having to enter each Traveller record. This functionality is explained in the Inwards/Outwards Processing Guides.
Buttons available when the request processing state is Initial Assessment	
Finalise Initial Assessment	Becomes available when a request state is Initial Assessment. Once an initial assessment outcome has been recorded for all travellers in a request, clicking this button progresses the state of the request and displays subsequent processing options.

Buttons only available after initial assessment has been finalised (not all buttons are available on all pathways)	
Generate Determination Template	Used by officers referring discretionary cases to the Commissioner. Generates the referral template to refer the request to the Commissioner
Send for Consideration	Used by officers referring discretionary cases to the Commissioner. Changes the request state to Pending Consideration and moves the request to the Commissioner / Sent & awaiting response list.
Send Outcome Notification	Generates a notification email which lists all travellers in the request and their outcomes. If necessary this button will also re-send the notification after a request is finalised. However note that clients are also able to view all sent notifications in their Portal account.
Finalise Case	Once all processing tasks have been actioned, including sending an outcome notification, this button closes and unassigns the request.

The Traveller record

Button	Purpose
Buttons available in most processing states	
Open Request	Closes the current traveller record and opens the request record.
Move to a different request	Unlinks the traveller from the current request and moves them to an existing request or a newly created request. See **Move a traveller from a request**
Save and Close	Saves any changes made to the traveller record and closes it.
Save	Saves any changes made to the traveller record but keeps the record open.
On Hold	Changes the traveller's processing state to 'On-hold'. See **Place a traveller on-hold.**
Resume from On Hold	Returns a traveller from a state of 'On-hold' to the original processing state at the time the traveller was put on hold. If a request is on-hold because all travellers were placed on-hold, resuming any travellers from on-hold will also return the request to the original processing state.
Assign to me	Not used in the traveller record – officers assign all travellers in a request to themselves by using the **Assign work to yourself** functionality in a List view or a request record.
Record Discretion Outcome	If 'Bulk Assess' functionality is not used to process exemptions, this button can be used by decision makers to record the outcome of a discretionary decision.
Send Outcome Notification	Not used in the traveller record as notifications are generated from the request record.
Generate Determination Template	Not used in the traveller record, only in the request record.
Send for Consideration	Not used in the traveller record, only in the request record.
Compose Email	Not used.

Managing attachments

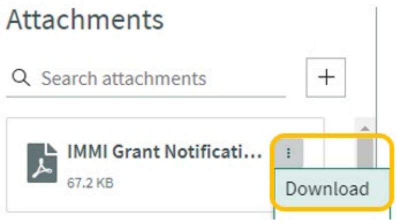
View attachments

To preview individual documents click on the document in the list of attachments. Some document types such as PDF and Word cannot be previewed, but all documents can be viewed if they are downloaded to your computer. Attachments can be downloaded individually or all at once.

Download one attachment

In a request locate the attachment in the Attachments panel.

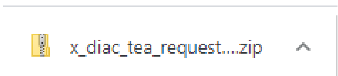
Click on an individual attachment's 'Menu' button to display the Download option



Download all attachments in a request

In a request locate the 'More' button in the Action bar and select 'Download Attachments':

The document will be available directly from your web browser, your web browser's download history, or from the Downloads folder in Windows Explorer. Multiple documents are downloaded in a ZIP file:



IMPORTANT: The following actions will be visible to the client when they login to their portal account, but the reason for the action is not recorded in the client's account:

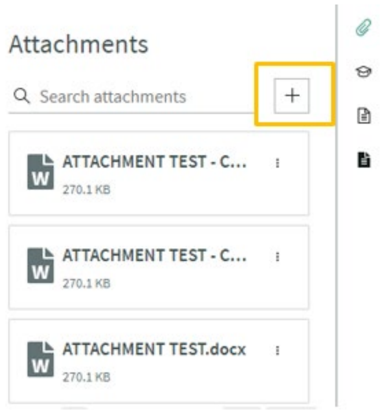
- Attachment renamed
- Attachment added
- Attachment renamed.

If you take any of the above actions, you are responsible for determining whether and how to communicate this to the client.

Add attachments

In a request locate the Attachments panel.

Click on the plus sign to open the document browser window:



Locate the document to add and click ‘Open’. The document will be added to the request’s attachments.

Note: Clients are able to upload a maximum of 25 attachments to a travel exemption request, however any attachments uploaded by Home Affairs/ABF staff do not count towards this limit.

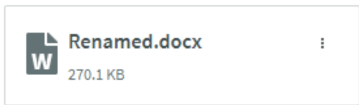
Rename attachments

Important dont’s when renaming files to avoid corrupting attachments: Do not rename the file type at the end of the document name (e.g. “.docx”). Avoid including any characters in a file name other than ‘safe’ characters such as a dash (-) or underscore (_) that you would use to name a file in Microsoft Windows.

In a request locate the Attachments panel.

Click on an individual attachment’s ‘Menu’ button to display the Rename option:

Type into the document name box and click ‘Enter’ on your keyboard to save your changes:



Remove attachments

Attachments can be removed from a request. While this is recorded in the system back-end for audit purposes, this action is not recorded either in the processing or client view of a record. To meet integrity and record keeping requirements, attachments are only to be removed with authorisation from a Superintendent / EL2.

Request information

To send a request for information:

- In the request record, click the Request Information button in the Action bar to display the due date picker:

- The default timeframe is (to midnight in) two days. This can be changed using the calendar icon
- Clicking 'OK' transfers the due date into the email template that will be displayed next
- Insert the information required from the client into the template; check the details including grammar/spelling, then click 'Send'.
- Click 'OK' in the pop-up window to record the activity.

Both the request state and External Status will change to *Awaiting Info*. The request will become unassigned and move to an Awaiting Info list.

Move a traveller from a request

A traveller, and any (or all) documents attached to the request, can be moved either:

- To a newly created request, or
- To any other open request submitted by the same client.

IMPORTANT: The following actions are also recorded in the client's portal account, but <u>the reason for the action is not recorded</u>:

- Move a traveller from a request to an existing request
- Move a traveller from a request to a newly created request (the client will see the new request in their submitted requests list)

If you take any of the above actions, you are responsible for determining whether and how to communicate this to the client.

Move a traveller to a newly created request

IMPORTANT:

When a traveller is moved to a new request:

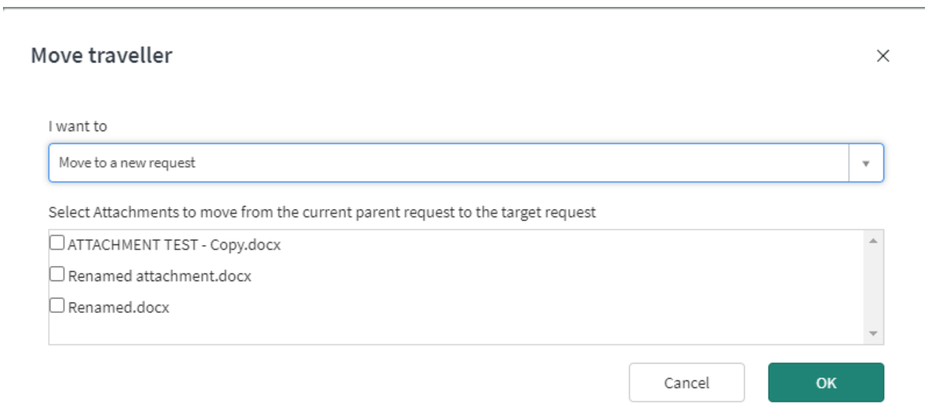
- their processing state will remain in its current state;
- the new request's processing state will mirror the traveller's processing state;
- the new request will be added to the client's Portal account, and the External Status applicable to the internal processing state will display to the client;
- If all travellers in a request are moved from it, that request will be closed.

For example if a traveller is at Outcome Notification and moved to a newly created request, the request will be created in a state of Outcome Notification, and the request's state in the client's account will show as Under Consideration.

To move a traveller:

- Navigate to the relevant traveller record in a request
- In the Action bar click 

- The Move traveller window is displayed:



- In the *I want to* options select *Move to a new request*

- Tick any attachments you wish to move with the traveller record
- Click 'OK'
- You may need to refresh your screen to see the effect of the changes.

Move a traveller to an existing request

Travellers can only be moved between open requests submitted from the same client account.

IMPORTANT:

When a traveller is moved to an existing request:

- the traveller's processing state will not automatically change to match the existing request's processing state;
- if the moved traveller is in a less advanced processing state than the request it was moved to, the request's processing state will revert to the moved traveller's processing state;

(for example if a request (and all its original travellers) is at Outcome Notification and a traveller at Initial Assessment is moved to it, the traveller record will not change but the request state will revert to Initial Assessment to match the newly added 'slowest moving' traveller).

- A record of the traveller move will be recorded on both requests in the client's Portal account;
- If all travellers in a request are moved from it, that request will be closed.

To move a traveller:

- Navigate to the relevant traveller record in a request
- In the Action bar click Move to a different request
- The Move traveller window is displayed. In the *I want to* options select *Move to an existing request,* and select the request you wish to move the traveller to:

- Tick any attachments you wish to move with the traveller record.
- Click 'OK'
- You may need to refresh your screen to see the effect of the changes.

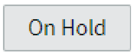
Place a traveller on-hold

On-hold functionality should only be used after referring to policy.

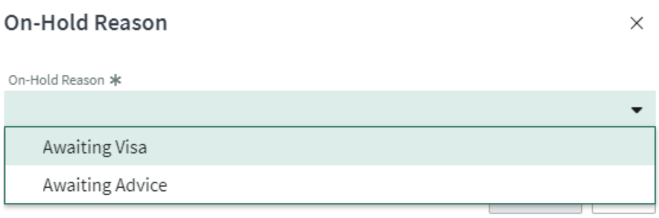
Placing a traveller on—hold pauses the processing time for that traveller. Placing all travellers in a request on-hold also changes the request processing state to on-hold and pauses the processing time for the request. If some, but not all travellers are placed on-hold, the request processing state will remain the same as the 'slowest moving' traveller.

Processing staff can only place individual travellers on-hold. If a request has multiple travellers, all travellers need to be placed on-hold and it would be unreasonable to action each traveller record individually, contact 22(1)(a)(ii) [redacted] to request assistance.

To place a traveller on-hold:

- In the traveller record, click the 

 button in the Action bar menu
- Select the reason to place on-hold:



- Click 'OK'

The request will not become unassigned, but will move to the On-Hold list.