

FAQ

How can I access information about a client?

Your individual client's information is conveniently stored in a location called the **Client Dashboard**.

The screenshot displays the SprintForms Client Dashboard. At the top left is the SprintForms logo. At the top right are links for 'Help' and the user 'Rui Chen'. The main content area is titled 'Client Details' and features a back arrow. Below this is a client profile card for 'Jeff Smith' with email 'saphier@gmail.com' and address '8 Lee Centre Dr, Apt 2209, Scarborough, Ontario, Canada'. To the right of the profile is a search bar labeled 'Search from client database'. Below the profile is a section titled 'Client Forms' containing a list of four forms: 'Sponsorship (Spouse)' (Marked as Complete, Review Detected Items, Oct, 18, 2019), 'Access to Information Consent (ATIP)' (Marked as Complete, Review Detected Items, Nov, 01, 2019), 'Sponsorship (Spouse)' (In-Progress, Oct, 30, 2019), and 'Sponsorship (Common Law Partner)' (In-Progress, Oct, 30, 2019). Each form entry includes a lock icon and an edit icon.

The client dashboard contains all information about your client in one place, including their profile information (name, address, email, telephone number) and any associated applications assigned to the client. From the Client Dashboard you can quickly jump into any of the client's applications, edit information associated with your client, review completed application's reports, and lock/unlock applications.

To access the Client Dashboard, simply search for the client from your **Practitioner Dashboard** and click on the results.

Welcome, Rui Chen

Create New

Create and send an application to your client

[Create New Application](#)

Recent Applications

Bobby Flay
Sponsorship (Spouse)

In Progress

Sammy Testler
Sponsorship (Spouse)

In Progress

Search from client database

Jeff Smith
saphier@gmail.com

Help! My client says their application is locked. How do I unlock their application?

The easiest way is to navigate to the **Client's Dashboard** by searching their name in your **Practitioner Dashboard**.

Welcome, Rui Chen

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Search from client database

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Once you are on the dashboard, locate the application they are working on and click on the lock/unlock icon on any specific application.

[← Back](#)









Client Details



Jeff Smith
saphier@gmail.com
8 Lee Centre Dr, Apt 2209, Scarborough, Ontario, Canada

[Search from client database](#)

Client Forms

Sponsorship (Spouse) Marked as Complete Review Detected Items	  Oct, 18, 2019
Access to Information Consent (ATIP) Marked as Complete Review Detected Items	  Nov, 01, 2019
Sponsorship (Spouse) In-Progress	  Oct, 30, 2019
Sponsorship (Common Law Partner) In-Progress	  Oct, 30, 2019

Viola! Your client's application is unlocked, and they can resume editing it.

Revision #4

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