

# Form Workflow

Form workflows are ideal for clients that are comfortable around forms, or for clients that you may already have a questionnaire previously completed.

To create a form, follow these steps:

Step 1: Choose your application bundle or individual forms.

Sprintforms supports the majority of Canadian immigration forms. For convenience, many of these forms are pre-bundled together to form an "application bundle". Click on any bundle to reveal their contents:

Humanitarian and Compassionate Application (8 Forms) Bundle \$79 ▲

Additional Dependents/Declaration [IMM 0008DEP] [Included](#)

Additional Family Information [IMM 5406] [Included](#)

Authority to release personal information to a designated individual [IMM 5475] [Included](#)

Background/Declaration [IMM 5669] [Included](#)

Document Checklist [IMM 5280E] [Included](#)

Generic Application Form for Canada [IMM 0008] [Included](#)

Supplementary Information: Humanitarian and Compassionate Considerations [IMM 5283] [Included](#)

Use of a Representative [IMM 5476] [Included](#)

Permanent Resident Card Renewal Bundle \$29

Permanent Resident Travel Document (PRTD) Bundle \$29

Provincial Nominee Application (Federal PR) Bundle \$79

Sponsorship (Common Law Partner) Bundle \$79

Search forms or Questionnaires

**Selected Forms**

Humanitarian and Compassionate Application (8 Forms) <span style="float: right;">\$79.00</span>	<span style="float: right;">X</span>
Additional Dependents/Declaration [IMM 0008DEP]	<a href="#">Included</a>
Additional Family Information [IMM 5406]	<a href="#">Included</a>
Authority to release personal information to a designated individual [IMM 5475]	<a href="#">Included</a>
Background/Declaration [IMM 5669]	<a href="#">Included</a>
Document Checklist [IMM 5280E]	<a href="#">Included</a>
Generic Application Form for Canada [IMM 0008]	<a href="#">Included</a>
Supplementary Information: Humanitarian and Compassionate Considerations [IMM 5283]	<a href="#">Included</a>
Use of a Representative [IMM 5476]	<a href="#">Included</a>

Discount \$79.00

Total \$0.00

**Continue**

Note: You can click on the "Included" link to exclude a specific form if you don't want it from your bundle.

You may also choose individual forms, in situations where you may only require one or two forms. In this example, we've selected only the Family Information Form and the PR Card Renewal Forms:

### Individual Forms

Search Individual Forms

<input type="checkbox"/> Additional Dependents/Declaration [IMM 0008DEP]	\$15
<input checked="" type="checkbox"/> Additional Family Information [IMM 5406]	\$15
<input type="checkbox"/> Additional Information – Refugee Claimants (Inside Canada) [IMM 0008 Schedule 12]	\$15
<input type="checkbox"/> Application for Citizenship Certificate for Adults and Minors [CIT 0001E]	\$15
<input checked="" type="checkbox"/> Application for a Permanent Resident Card [IMM 5444]	\$15
<input type="checkbox"/> Application for a Permanent Resident Travel Document [IMM 5524]	\$15

Search forms or Questionnaires

### Selected Forms

Additional Family Information [IMM 5406] (1 Form)	\$15.00
Application for a Permanent Resident Card [IMM 5444] (1 Form)	\$15.00
Discount	\$30.00
Total	\$0.00

Continue

## Step 2: Assign your client, and select form creation options

Now that you've chosen your application bundle or individual forms, assign the client that these forms belong to. You can also select options about these forms, including copying information from pre-filled questionnaires, and/or assigning work to other practitioners.

In the following example, we've assigned the selected forms from the last screen to an existing client named "Bobby Smith", and have chosen to Copy Data from Bobby's previous questionnaire. The assigned practitioner has been left to the account holder:

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## Step 2: Assign Client to Selected questionnaire or form

You've selected your questionnaire or form. Now assign these questionnaire or forms to a client.

### Individual Forms (2 Forms)

Given Name:

Last Name:

Email Address:

Phone Number (Optional):

Mobile Number (Optional):

Assigned Practitioner:

Copy Data From:

 

### Your Clients

-  Bobby Smith  
bobby@smith.com
-  Smithers Bobby  
test@test.com
-  Bobby Flay  
sprintforms@gmail.com
-  Bob Jones  
2@2.com
-  bob smith  
bob@smith.com
-  Bob Rainer  
wajeg64453@finxmail.net

Note: If you don't see the "Copy Data From" selection, make sure you've assigned the forms to a client that has previously completed a questionnaire. Clients who are known to Sprintforms will appear on the right box under - you can click on their names/emails to ensure that you're selecting the right client.

## Step 3: Review Your Selection

The last step is to review your selections and your order details. You may be asked to provide payment details on this screen if you do not have a saved credit card and/or are not on a monthly plan.

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## Order Overview

Review your selections below.



Bobby Smith

bobby@smith.com

Copying Data From Bobby Smith's Intake Form – General



Send email invitation to bobby@smith.com to start the application

### Selected Forms

Additional Family Information [IMM 5406] (1 Form)	\$15.00	
Application for a Permanent Resident Card [IMM 5444] (1 Form)	\$15.00	
Discount	\$30.00	
Total	\$0.00	

**Create & Send**

Note: You can also choose not to notify your client of the creation of this form (bundle), if you'd like to edit the application yourself. You can choose to notify them at a later date via the client information screen.

Once you press "Create & Send" your intake form has been successfully created! You can view the intake form right away, or return to the dashboard.

# Thank you

Your application has been created. You may view the created application, or return home.

An invitation to fill in this application was sent via email to Test Client at test.client@testclientsprintforms.com.

[View Form](#)[Return Home](#)

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