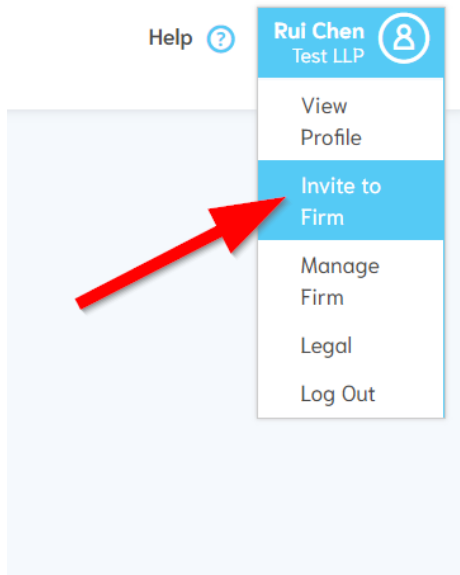


# Working in a Firm

Sprintforms supports working collaboratively with members of your law firm. To get started, you can invite people to your firm by using the "Invite to Firm" menu item, and entering their emails in the pop up box that follows.



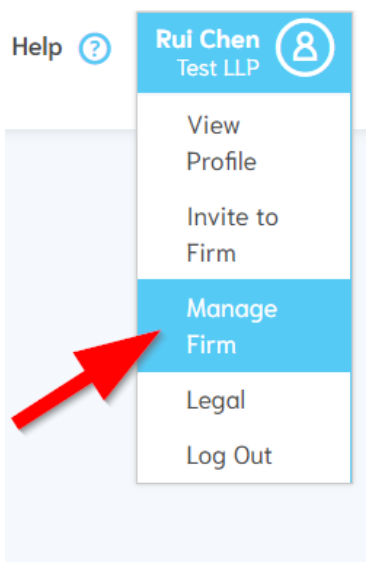
## Firm Roles

Members of your firm can be assigned two different roles: "Practitioner" or "Processor".

**Practitioners** are individuals whose information will be available to pre-fill Use of Representative forms. Typically, these individuals who are both: 1) authorized to represent clients for consideration under Canadian immigration law, and 2) usually a signatory on the Use of Representative form.






**Processors** are individuals who may work on forms, but will never have their information be on the Use of Representative form. Generally, these are individuals who will work under the name of a lawyer, paralegal, or immigration consultant.

To choose your firm members' role, navigate to the "Manage Firm" page on the top right menu:



You'll then see a list of Firm Members who are part of your firm. You can click on the "Practitioner ..." or "Processor ..." button to change their role:

### Firm Members (5)

 Rui Chen	<a href="#">Creator</a>
 Christopher Firmtest	<a href="#">Practitioner ...</a> <a href="#">Remove ...</a>
 Bobina Smith Sanders-Wong	<a href="#">Processor ...</a> <a href="#">Remove ...</a>
 Robert O'Brien	<a href="#">Practitioner ...</a> <a href="#">Remove ...</a>
 a i	<a href="#">Practitioner ...</a> <a href="#">Remove ...</a>


## Assigning Files

Once you have members in your firm, you will be given an additional option when creating questionnaires or forms to assign these questionnaires or forms to a particular firm practitioner:

[← Back](#)

## 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.

Application for a citizenship certificate (adults and minors) – Subsection 5(2) (3 Forms) 

Given Name:

Last Name:

Email Address:

Phone Number (Optional):

Mobile Number (Optional):

Assigned Practitioner: 

Myself

Myself




Christopher Firmtest

Robert O'Brien

a i

Copy Data From:

### Your Clients

-  Bobby Smith  
bobby@smith.com
-  Smithers Bobby  
test@test.com
-  Bobby Flay  
sprintforms@gmail.com

### Selected Forms

Application for a citizenship certificate (adults and minors) – Subsection 5(2) (3 Forms) ▼	\$29.00 
Application for Citizenship Certificate for Adults and Minors [CIT 0001E]	<a href="#">Included</a>
Document Checklist [CIT 0014E]	<a href="#">Included</a>
Use of a Representative [IMM 5476]	<a href="#">Included</a>

Discount \$29.00

**Total** \$0.00

Continue

Assigning a specific practitioner will have their information prefilled on the form bundle's Use of Representative forms (if applicable). It also provides an easily accessible way for you to keep track of who is responsible for which client's file.

## Firm Files

Sprintforms will allow for you to view, edit, and contribute to any of your firm members' forms/questionnaire. You can do so by searching for a specific client on the right hand side search bar:



Test Client

## Your Clients



Test Client  
test.client@gge.com  
4165203106

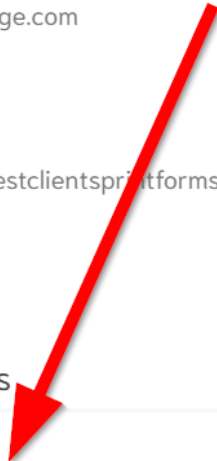


Test Client  
test.client@testclientsplatforms.  
com  
4165203106


## Law Firm Clients





Test Client  
test.client@gge.com  
4165203106



You will also find a list of your firm's most recently accessed files on the bottom of your "Recent Applications" list:




Bobby Smith  
Intake Form – General





In Progress  
Assigned to: Rui Chen  
Date Created: Nov 26, 2019


## Firm's Recent Applications





Test Client  
Individual Forms



In Progress  
Assigned to: Bobina Smith Sanders-Wong  
Date Created: Aug 26, 2020



Rui Chen  
Sponsorship (Common Law Partner)




In Progress  
Assigned to: Christopher Firmtest  
Date Created: Nov 15, 2019

Lastly, you can even create applications/forms for your firm's clients, including using any of the client's previously prefilled questionnaires. In the example below, we've found our "Test Client" from the Law Firm Client section of the search bar, and are in the process of assigning them to a new Quebec application form to them. We've also assigned the practitioner of "Christopher Firmtest" as the assigned practitioner.

[← Back](#)

## 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.


Application for Permanent Residence – Federal Self-Employed Persons and Quebec Selected Self-Employed Persons (9 Forms) 

Given Name:	<input type="text" value="Test"/>
Last Name:	<input type="text" value="Client"/>
Email Address:	<input type="text" value="test.client@gge.com"/>
Phone Number (Optional):	<input type="text" value="4165203106"/>
Mobile Number (Optional):	<input type="text"/>


Assigned Practitioner:	<input type="text" value="Christopher Firmtest"/> ▼
------------------------	-----------------------------------------------------

Copy Data From:	<input type="text" value="Don't copy – start as a blank form"/> ▼
-----------------	-------------------------------------------------------------------


### Your Clients

- 
 Test Client  
 test.client@gge.com  
 4165203106
- 
 Test Client  
 test.client@testclientsprintforms.com  
 4165203106

### Law Firm Clients

- 
 Test Client  
 test.client@gge.com  
 4165203106

### Selected Forms

Application for Permanent Residence – Federal Self-Employed Persons and Quebec	\$79.00 
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Revision #2

Created Fri, Dec 4, 2020 6:49 PM by [rui](#)

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