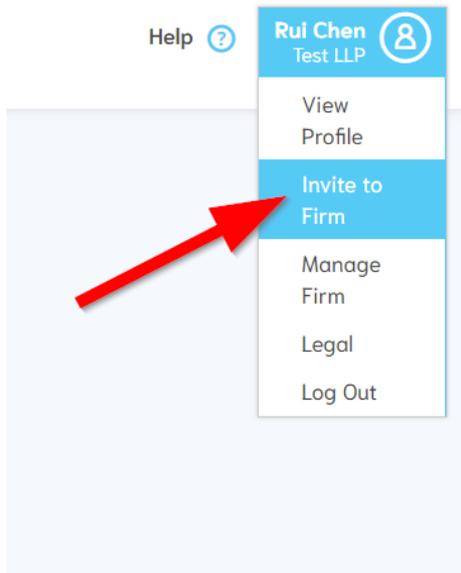


Working in a Firm

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.



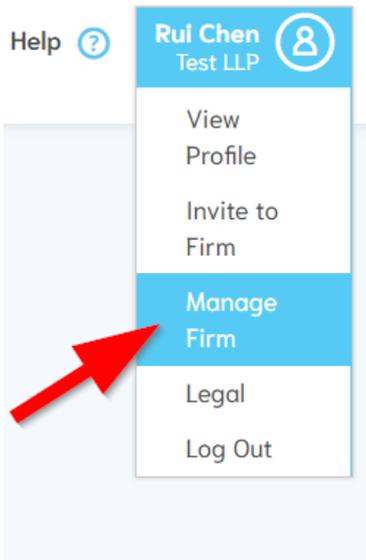
Firm Roles

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

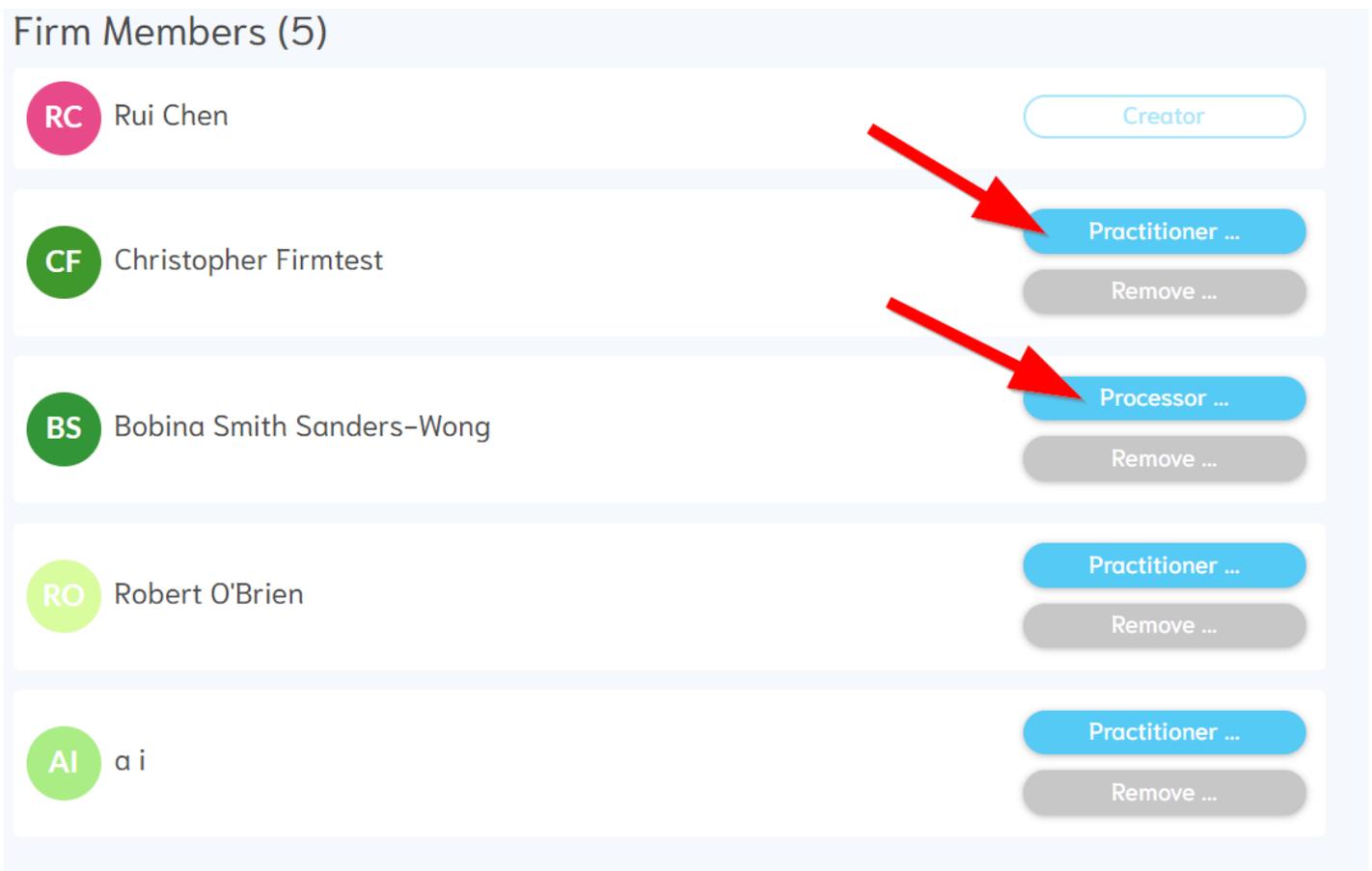
Practitioners are individuals whose information will be available to pre-fill Use of Representative forms. Typically, these individuals who are both: 1) authorized to represent clients for consideration under Canadian immigration law, and 2) usually a signatory on the Use of Representative form.

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:



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
- 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]	Included
Document Checklist [CIT 0014E]	Included
Use of a Representative [IMM 5476]	Included

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@testclientsprintforms.
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:

The screenshot displays a user interface for managing applications. At the top, a card for Bobby Smith's 'Intake Form - General' is shown, with a red arrow pointing to it. Below this is a section titled 'Firm's Recent Applications' containing three more cards. Each card includes a user icon, the application name, its status ('In Progress'), the assigned practitioner, and the creation date. The cards are: 1) Test Client Individual Forms assigned to Bobina Smith Sanders-Wong (Aug 26, 2020); 2) Rui Chen Sponsorship (Common Law Partner) assigned to Christopher Firmtest (Nov 15, 2019).

Applicant	Application Name	Status	Assigned to	Date Created
Bobby Smith	Intake Form - General	In Progress	Rui Chen	Nov 26, 2019
Test Client	Individual Forms	In Progress	Bobina Smith Sanders-Wong	Aug 26, 2020
Rui Chen	Sponsorship (Common Law Partner)	In Progress	Christopher Firmtest	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:

Last Name:

Email Address:

Phone Number (Optional):

Mobile Number (Optional):

Assigned Practitioner:

Copy Data From:

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



Revision #2

Created Fri, Dec 4, 2020 6:49 PM by rui

Updated Fri, Dec 4, 2020 7:47 PM by rui