

IMMCASE USER GUIDE

Send an eForm to a client

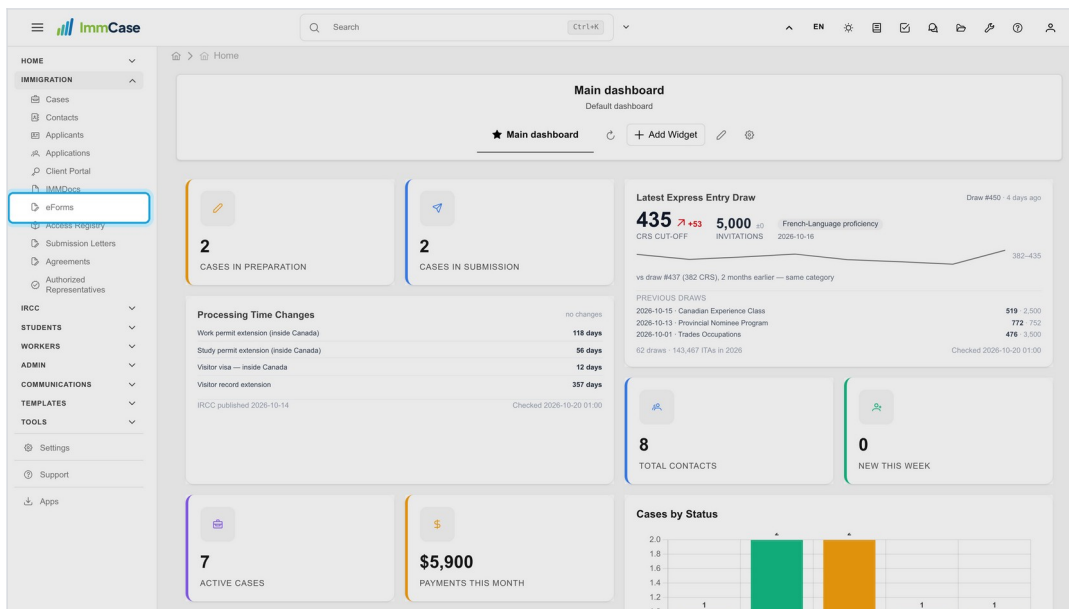
ImmCase · guides.immcase.ca · 2026-10-20

An **eForm** is an IRCC form, such as the IMM 1294 study permit application, that your client fills in online from a link, on their phone or computer. You send it from ImmCase, watch their progress, and review the answers before they go into the application.

The client («Daniela Ruiz») and firm in this guide are **fictional**; the link goes to an example.com address that nobody receives.

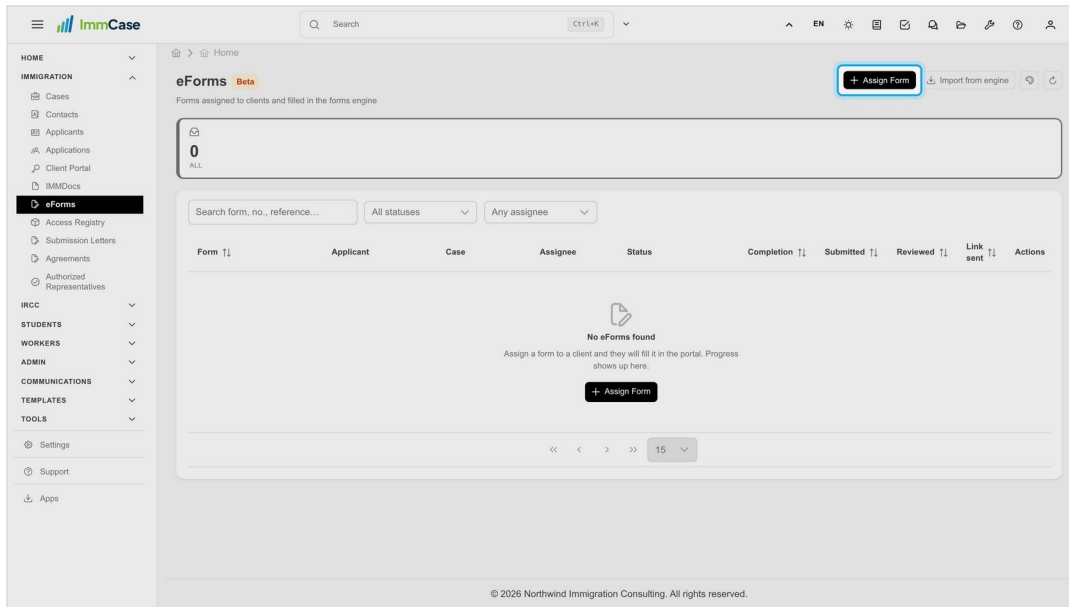
1. Open eForms

In the left menu, open **Immigration** and click **eForms**.



2. Assign a form

Click **Assign Form**, top right.



3. Who, which form, and a note

Under **Applicant**, search the person's name and pick them; the case is filled in for you. Choose the **Form** (here IMM1294 - Study Permit Outside, 150 questions). Add a short **note for the client** if you like. Leave **Require review** on so nothing is accepted before you check it, and **Email the link** on to send it right away.

The screenshot shows the 'Assign eForm' modal in the ImmCase system. The modal is titled 'Assign eForm' and has a close button (X) in the top right corner. It features three tabs: 'Case', 'Applicant' (selected), and 'Contact'. Under the 'Applicant' tab, there is a search bar labeled 'Applicant *' with a dropdown menu showing 'IMA0271 - Daniela Ruiz'. Below this, a note states 'Will be assigned under CAS26012 Daniela Ruiz.'. The 'Form *' section has a dropdown menu showing 'IMM1294 - Study Permit Outside'. Below this, a table displays the form details: 'Form No.' (IMM 1294), 'Questions' (150), and 'Pages' (10). The 'Notes for Client' section has a text area with the note 'Please fill this in by Friday. Ask me if anything is unclear.'. The 'CRM Reference' section has a text field with the placeholder 'Optional reference (auto-filled from case folio)'. At the bottom, there are two toggle switches: 'Require review before acceptance' (checked) and 'Email the link to the client now' (checked). The modal has 'Cancel' and 'Assign Form' buttons at the bottom right.

Form No.	IMM 1294
Questions	150
Pages	10

4. Send it

Click **Assign Form**. The client receives an email with their personal link.

Notes for Client

Please fill this in by Friday. Ask me if anything is unclear.

CRM Reference

Optional reference (auto-filled from case folio)

☐ Require review before acceptance

☐ Email the link to the client now

Cancel Assign Form

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5. Follow their progress

The form appears in the list as **Assigned**, with the case, the date the link was sent and, once the client starts, how much is filled in. The counters at the top show what is **waiting on the client** and what **needs your review**. When they submit, open the form, check the answers and accept them or send them back with a comment.

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Forms assigned to clients and filled in the forms engine

+ Assign Form

Import from engine

1 ALL

1 WAITING ON CLIENT

Search form, no., reference...

All statuses

All form types

Any assignee

Form	Applicant	Case	Assignee	Status	Completion	Submitted	Reviewed	Link sent	Actions
IMM1294 - Study Permit Outside IMM 1294	DR Daniela Ruiz	CAS26012	Sarah Martin	Assigned	Review	—	—	—	today

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Good to know

- **From the case, too.** The case's Workspace lists its eForms next to the document checklist.

- **Lost link?** The link icon on the row copies the client's link, so you can send it another way.
- **Your logo on the form. Portal branding,** at the top of the eForms page, sets the name and logo your clients see.

Questions: hello@immcase.com.