H&C Intake

Send a client a guided humanitarian and compassionate questionnaire in eleven languages, then turn their answers into a four-document approval bundle. The form is on every plan; the AI bundle is Premium.

Up to date as of v1.31.0

CONTENTS

What it is

A humanitarian and compassionate application asks your client to account for their whole life, and the hardest part of preparing one is getting that account out of them. H&C Intake turns it into a guided conversation. You send a private invitation from a client who has a signed H&C agreement on file; they answer plain-language questions in their own language, at their own pace, on any device.

When they submit, you can generate a per-client approval bundle of four documents: a document checklist grouped by H&C factor, a first-person explanation letter for the applicant, and support-letter templates for a family member and for a friend. You review and edit everything before approving it.

The intake form is included on every plan. Generating the bundle, and scanning documents from your drive to prefill the form, are Premium.

Sending one, and what the client sees

Start an H&C Intake from a client with a signed H&C agreement. The agreement already holds their name, date of birth, contact details, address, and the family members on the matter, so the form arrives with those proposed rather than blank. Review the proposals, accept the ones you want, then send the invitation.

The client opens a private link, picks their language on the first screen, and works through one topic at a time with Back and Next on every page. Everything is saved as they type, so they can stop and come back. Nothing reaches you until they submit.

What the agreement does not establish is deliberately left blank. It records who is on the matter, not who lives in Canada, so the family-in-Canada questions are the client's to answer: a claimed tie that is not there is worse than an empty field.

Eleven languages

The client answers in whichever of the eleven languages they choose, and can switch at any point without losing an answer. English and Quebec French are written by hand. The other nine are machine-translated, and the page says so, because a client should know which kind they are reading.

Two of the eleven cannot yet be drawn in the checklist PDF: Punjabi and Chinese. The letters are Word documents and are unaffected, so they render correctly in every language.

The checklist and the letters are produced in the language you choose when you generate them, which does not have to be the language the client answered in.

Sections a client may decline

Family violence, medical conditions, and criminal history are asked about because they bear on an H&C application. A client may not be ready to write about them in a web form, so each of those sections can be declined outright.

A decline is recorded as a decline, and the distinction carries through the whole bundle:

- Your checklist shows a question the client chose not to answer, rather than an answer of No.
- The explanation letter leaves the topic out entirely. It does not write around it, and it does not note that something was left out.

That is the point of recording it rather than guessing: you can raise the subject with the client directly, outside a form.

The four documents

Once the client has submitted, Generate produces four documents together. Approval is one gate: you read and edit them, then approve the set.

- The document checklist (PDF), grouped by H&C factor, with a reason for every item drawn from this client's own facts.
- The applicant's explanation letter (Word), written in the first person from their answers and marked DRAFT on its face.
- A support-letter template for a family member (Word).
- A support-letter template for a friend (Word).

What the checklist will not do

It lists documents and says why each is relevant. It does not weigh them, score the application, or predict an outcome, and a check flags any sentence that drifts toward doing so before you approve. The submissions are yours to write. The checklist is never sent to the client.

Why the letter says DRAFT

It is a first-person account of someone's life assembled by a machine, and it should not reach them looking finished. Read it, correct it, and remove the marking when it says what your client would say.

Why the support-letter templates are mostly blank

A support letter carries a family member's or friend's signature, and pre-filling their words would put words in their mouth on a document they sign. Only the applicant's name and the file reference are merged in. Both templates ask the writer to rewrite the letter in their own words and to include their contact information and a photocopy of government-issued ID.

Corrections, filing, and privacy

You and your team can edit any answer from the dashboard, before or after submission, and each field records where its current value came from. If the client is typing at the same time as you, the form keeps both: your surface reloads their version and re-applies only the fields you touched.

Submitting locks the form. If a correction is needed, reopen it and the client is emailed a fresh link; the previous link stops working. The same is true when you resend an invitation.

On approval you can file the bundle to your connected drives, where it lands in the matter's Application folder. Filing is queued rather than immediate, so the documents usually appear within about five minutes. If one is still missing well after that, check your Storage settings for a drive that needs reconnecting.

Answers, uploaded documents, and the generated letters are encrypted at rest under a key belonging to your firm. The invitation link carries an opaque token that is not the agreement reference. The audit trail records what happened and when, never the client's answers.