Intake Forms

Public intake wizard that triages every visitor through nine bilingual steps and ten category branches, producing a deterministic lead summary (urgency, readiness, suggested service, risk flags) plus a server-rendered PDF that auto-saves to your connected Drive. Active File Review handoff via prefill token, AI document analysis on Premium, and a settings hub for routing, disabled categories, custom thank-you, notification CCs, and urgent-subject prefix.

Up to date as of v1.29.0

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Overview

Intake Forms is the public-facing acquisition surface for new client matters. A prospective client lands on your firm's slug-addressed intake URL, walks through a nine-step bilingual wizard that adapts to their answers, picks a matter category, completes the category-specific branch, and submits. The platform processes the submission into a deterministic lead summary (an urgency score from zero to four, a readiness score from zero to four, a suggested service from your catalogue, a list of risk flags, and a structured sales note), generates a PDF of the full intake, optionally saves the PDF to your connected Google Drive or Microsoft 365 OneDrive, and notifies you by email so you can follow up before the prospect cools off.

The wizard has ten category branches that change the questions a visitor sees: Permanent residence; Temporary residence (visit, study, work); Citizenship; Refugee or asylum matter; CBSA enforcement, removal, detention, or inadmissibility; IRB hearing, appeal, or tribunal matter; Employer / LMIA / work permit support; I am not sure; Coming soon (a placeholder for matter types your practice does not yet support); and Urgent (a fast-path for matters with a deadline). Each branch reaches into the relevant immigration vocabulary so the visitor is asked questions that map to how you would scope the file. The lead summary is computed deterministically at the end of the wizard, so the score you see is reproducible from the visitor's answers and not subject to interpretation between submissions.

> **Note**: Intake Forms is open to every tenant on every tier. Basic and Premium both see the module, the public intake URL, the dashboard, and the settings page. AI document analysis (Gemini-powered passport and supporting-document parsing on the contact step, per-family-member rows, and the PR-branch language-test fields) is Premium-only, as is the runtime translation of the wizard into the eight additional Phase-10C languages. Everything else, including the deterministic lead summary, Active File Review routing, Drive auto-save, and the audit ledger, ships to every tenant.

Important: read before using

> **Important**: Intake Forms collects PII. The wizard asks for the visitor's full name, email, phone, country of citizenship, immigration status, family composition, deadline (where applicable), and optional uploaded documents (passport, supporting evidence). Every PII field is encrypted at rest under your tenant data-encryption key (DEK), wrapped under the master key-encryption key (KEK) in our environment variables. Treat every submission as confidential client information from the moment it arrives in your dashboard — including the submissions that never become retainers.

The lead summary is a triage helper, not a retainer scope. The urgency score reads the visitor's free-text and selected deadline; the readiness score reads what the visitor uploaded; the suggested service is a deterministic match against your service catalogue. None of those signals substitute for your professional review of the file before you commit to taking the matter. The summary exists so you can prioritize your inbox at a glance, not so you can quote without reading. The category branches use IRCC's vocabulary but do not classify the matter for you; you read every submission before responding.

The public intake form is the first impression your firm makes on a prospect. Use the settings to disable categories your practice does not handle (so visitors do not waste time on a category you will reject), to set a custom thank-you message that warms the relationship, and to route active-file matters into the Active File Review module via the Strict mode. The intake URL is robots-blocked at our end so search engines do not index it, but anyone with the URL can submit; share it openly with prospects, embed it on your website, and link to it from your social media.

Share the intake URL

The first card on the Intake Forms dashboard is the intake-URL share card. It carries your firm's public intake URL in the form https://rcicapp.ca/intake/<your-slug>, a Copy URL button, a Share in another language disclosure, and a Show iframe embed code disclosure. The URL is the only thing your prospect needs to land on the intake wizard; share it via email, on your firm's website, in a social-media post, on printed materials, or however else you reach prospects. The URL is stable for your firm — it does not change when you edit settings or update your slug.

The URL is public but unguessable for tenants whose slug is not obvious. Anyone who has the URL can submit; there is no per-prospect token at intake. We robots-block the path so search engines do not index it (an intake URL has no SEO value), but the page resolves to anyone who pastes it into a browser, an email client, or a messaging app. If you ever need to invalidate an old URL (because, for example, you changed your firm's name), reach out to our support team and we will help you migrate to a new slug without breaking your existing client relationships.

Share in another language

Click Share in another language on the intake-URL card to expand a dropdown of the languages your tenant has enabled. Pick a language and the platform appends ?lang=<code> to the intake URL so the wizard renders directly in that language when your prospect opens the link (no manual picker click needed). English and Quebec French are always available because the wizard copy is hand-curated in both. Premium tenants additionally see Spanish, Simplified Chinese, Punjabi, Arabic, Hindi, Tagalog, Urdu, and Farsi, all rendered at request time through Google Translate against the same English canonical source.

The eight runtime-translated languages share the language set you configure for your public booking page (Settings -> Premium -> Languages). If you want a language available on the intake wizard but you do not have it ticked there, tick it on the Premium settings page first. The set is shared across modules, so a tenant who serves a Punjabi-speaking client base ticks Punjabi once and the intake wizard, the booking page, the Active File Review intake, and the other client-facing language pickers all honour it. The prospect can still override your chosen language by clicking the picker on the wizard itself; the URL parameter sets the initial value, the picker lets them change it.

Embed the intake on your website

Click Show iframe embed code on the intake-URL card to reveal a copy-ready HTML snippet. The snippet wraps the intake wizard in an iframe sized to one hundred percent width and a generous minimum height with lazy loading and an accessible title. Paste it on any page of your firm's website and your visitors fill the wizard without leaving your site. The wizard detects the embed mode via a ?embed=1 query parameter and drops the full-screen grey background, the marketing header, and the Powered-by footer so the form renders edge-to-edge in your layout.

When you embed, the same language behaviour applies. Append ?lang=fr or another supported code to the iframe src so that the embedded wizard opens in that language directly. If your firm's website is multilingual, link to two different copies of the snippet (one per language) from the two language versions of your page. The wizard adapts its height as the visitor moves through the nine steps; the embedded iframe does not auto-resize across origins (a known browser security boundary), so the snippet uses a minimum height generous enough to fit the entire wizard plus a buffer.

The list page

The list page at /dashboard/intake-forms shows every submission your firm has received, ordered by newest first. The header carries the module name, the public intake URL, and the iframe embed share card. Below those, a filter bar lets you scope by status (new / under review / converted / declined / archived), by matter category, by urgency band (urgent / tight / normal / unknown), and by suggested service. The table has six columns: Reference (IF-YYYY-XXXXXX, the canonical intake ID that doubles as the Start-from-code reference for Service Agreements), Client (decrypted server-side from the encrypted column), Category, Urgency badge, Suggested service, Submitted at (in your tenant timezone). Click any row to land on the submission detail page.

The status pills follow a deliberate workflow: New (just arrived; you have not reviewed it yet) -> Under review (you opened it but have not decided yet) -> Converted (you turned it into a Service Agreement or sent the prospect into Active File Review) / Declined (you decided not to take the matter; structured reason recorded) / Archived (older than your retention window or manually archived). Status changes write entries to the append-only audit ledger so you can reconstruct the lifecycle of any submission long after the fact. The pre-Phase-58 flow used the status enum to drive the Bookings module's send-the-intake-form flow; that path now stamps status='invited' (a sixth value, intermediate between new and under-review) when a Booking Notes Send the Intake Form hand-off is in flight.

The public intake wizard

When your prospect lands on the intake URL, they see your firm's name, logo, and a short welcome line. Below that, a nine-step wizard walks them through the submission. The steps are: (1) Consent — accept your firm's privacy notice plus the platform's data-handling notice; (2) Role — pick whether they are the prospective client themselves, a family member helping on the client's behalf, or an authorized representative; (3) Contact — full name, email, phone, optional Premium AI document upload (passport scan, supporting documents); (4) Family — main applicant plus any family members included in the matter, with per-row contact and Premium AI passport-extract; (5) File status — pick whether the matter has an active or ongoing IRCC / CBSA / IRB / ESDC file (this drives the Active File Review routing); (6) Urgency — declare any deadline (response deadline, court date, biometrics window, etc.); (7) Category — pick one of ten matter categories your firm handles; (8) Branch — answer category-specific questions that scope the matter; (9) Review — read back the answers, edit any of them, submit.

The wizard is bilingual English plus Quebec French out of the box, with eight additional languages available on Premium via runtime translation. The visitor's locale is picked from the ?lang= URL parameter first, then the lang cookie set by their previous visit, then the system default of English. The submit button on the Review step is disabled until every required field is valid; we deliberately do not let the prospect submit a half-filled form because an incomplete intake produces a useless lead summary and wastes both their time and yours. Files uploaded on the contact step or family rows go through signed-URL direct upload to bypass the platform's request-body cap, the same way Active File Review intakes work; per-file cap is 50 MB, total intake cap is 150 MB.

The ten category branches

After the visitor picks a matter category at step seven, the wizard branches into category-specific questions that match how you would scope a file in that area. Each branch asks the smallest set of questions necessary to triage the matter without burying the prospect in details that belong in a paid consultation. The ten branches are calibrated against typical Canadian immigration practice; if your firm specializes in a sub-area (say, business immigration through the Quebec Investor Program), the generic branch still produces a useful lead summary even if some questions do not perfectly fit your niche.

- Permanent residence: stream (Express Entry, PNP, family class, business, refugee, H&C, other), current PR status (none, has applied, has been refused, has been approved, withdrew), accompanying family, deadlines.
- Temporary residence (visit, study, work): current status in Canada (none, visitor, student, worker, expired status, other), purpose of the application (visit, study, work, change of status, restoration), deadlines.
- Citizenship: current PR status, time spent in Canada, language test status, recent travel history that might affect residency calculations.
- Refugee or asylum matter: stage of the claim (intake, hearing scheduled, hearing held, decision pending, decision received, PRRA, appeal), country of feared persecution, family members involved.
- CBSA enforcement, removal, detention, or inadmissibility: nature of the matter (admissibility hearing, removal order, detention review, criminal inadmissibility, etc.), upcoming dates, current location.
- IRB hearing, appeal, or tribunal matter: division (Immigration Division / Immigration Appeal Division / Refugee Protection Division / Refugee Appeal Division), hearing date, type of matter.

- Employer / LMIA / work permit support: requester role (employer or employee), program (high-wage LMIA, low-wage LMIA, LMIA-exempt, GTS, AIP, etc.), province, deadlines.
- I am not sure: a catch-all that lets the visitor describe the matter in free text. The lead summary still computes urgency and readiness; the suggested service falls back to a consultation.
- Coming soon: a placeholder for matter types your practice does not yet support. Captures the prospect's contact info so you can follow up if your scope expands.
- Urgent: a fast-path for matters with a binding deadline (PFL response, removal order, detention review, etc.). Skips some of the category branching to capture the deadline and a brief description as fast as possible.

The deterministic lead summary

Every submitted intake produces a deterministic lead summary the moment the prospect clicks submit. The summary carries five signals: an urgency score from zero (no time pressure) to four (binding deadline within seven days), a readiness score from zero (no documents uploaded, vague answers) to four (every requested document attached, every answer specific), a suggested service drawn from your service catalogue that matches the matter category and complexity, a list of risk flags (inadmissibility indicators, prior refusals, family-class red flags, urgency-versus-readiness mismatch), and a structured sales note that highlights the prospect's stated goal in their own words plus any specific facts you should know before responding. The summary is deterministic — the same answers always produce the same scores — so you can compare submissions across time without worrying about scoring drift.

The urgency score is computed from the deadline the visitor declared at step six plus the matter type. A PFL response with a thirty-day deadline arriving with seven days remaining scores four; a generic permanent-residence consult with no deadline scores zero. The readiness score is computed from what the visitor uploaded plus how specific their answers were; an uploaded passport bio page plus a refusal letter plus a typed narrative of two paragraphs scores four; a one-sentence summary with no uploads scores one. The suggested service maps the matter category plus the complexity plus your service catalogue into a single recommended next step — usually a paid consultation with a specific service-line, or a direct retainer when the readiness is high enough that you can quote without a consultation.

Risk flags are the surface alerts you read first when you open a submission. They flag the answers that need professional review before any commitment: a prior refusal mentioned in the narrative, an inadmissibility indicator (criminal conviction, misrepresentation, medical, security), a tight deadline that the readiness score does not match (high urgency plus low readiness is the classic 'walk-in PFL response without documents' pattern), a family-class scope risk (e.g. the sponsor is on the same intake as the principal applicant which limits independent communication), or a duplicate-intake pattern (this email submitted three intakes in the last week — usually a prospect shopping around). The structured sales note ties everything together: it quotes the prospect's stated goal verbatim, lists the specific facts you need to know, and recommends a tone for your first reply (warm, fast, deferential, or cautious depending on the flag set).

Viewing a submission

Click a row on the list page to open the submission detail. The page is dense by design: a header with the IF-YYYY-XXXXXX reference, the client name, the submission timestamp in your tenant timezone, and the current status pill. A two-column layout sits below: the left column carries the lead summary card (urgency / readiness / suggested service / risk flags / sales note) at the top, followed by the structured answers grouped by wizard step (Consent, Role, Contact, Family, File status, Urgency, Category, Branch); the right column carries the uploaded documents (every file with a per-row Download button), the AI extraction card (Premium only, when documents were uploaded), the action card (Convert to Service Agreement / Send to Active File Review / Decline with reason / Archive), and the audit ledger card.

The action card drives the conversion. Convert to Service Agreement uses the IF-YYYY-XXXXXX reference as the Start-from-code input for the Service Agreement Builder — click and a fresh SA draft opens pre-filled with the client identity, family members, matter framing, and any uploaded documents threaded through as AI Populate context. Send to Active File Review mints a five-minute prefill token and redirects to your AFR intake URL with the answers already populated; the prospect signs in (or proceeds anonymously, depending on your AFR settings) and the AFR-side intake captures the matter with the IF-YYYY-XXXXXX reference back-linked. Decline with reason captures a structured reason (out of scope, no capacity, conflict of interest, etc.) plus an optional free-text note; the platform never sends a decline email to the prospect automatically — that conversation belongs to you, not us.

Start from code: IF-YYYY-XXXXXX as a Service Agreement seed

Every intake submission carries a stable identifier in the form IF-YYYY-XXXXXX, where YYYY is the year of submission and XXXXXX is a six-character random identifier. The reference appears at the top of the submission detail page and on the list table. It doubles as a Start-from-code input for the Service Agreement Builder: open /dashboard/agreements, click Start from code, paste IF-YYYY-XXXXXX, and a fresh SA draft opens pre-filled with the client identity (full name, email, phone, address, date of birth, country of birth, citizenship), the family roster (every family-member row from the intake, including those marked as accompanying), the matter framing (type, code, scope) drawn from the matter category and branch answers, and the uploaded documents available as AI Populate context for any further extraction you want.

The seeded SA carries a source pointer back to the intake (source_kind = intake_form, source_id = the submission ID), so the SA detail page renders a back-link card to the original submission and the submission detail surfaces a Linked Service Agreement card. The two records are bonded for life. Converting an intake to an SA flips the intake's status to Converted and writes an entry to the audit ledger. The intake's documents remain accessible from both surfaces — the SA's AI Populate modal lists them as available extraction sources, and the submission detail page's Documents card still surfaces them directly. The Start-from-code surface is also the entry point for Service-Proposal-coded matters (SP-YYYY-XXXXXX) when you want to convert an accepted proposal directly to an SA without a re-keying step.

Settings: Active File Review routing

The first card on the settings page controls Active File Review routing. When a visitor indicates their matter involves an active or ongoing file (at step five of the wizard, the File Status step), you decide whether they are redirected to your Active File Review intake immediately or allowed to continue through the generic Intake Forms wizard. Two radio options are available: Strict, the default, redirects the visitor to AFR as soon as the file-status step indicates an active file; the AFR intake opens with the answers already populated via a five-minute prefill token, so the visitor does not re-key anything they have already typed. Soft lets the visitor continue through the Intake Forms wizard; their submission carries an AFR-recommended badge in your dashboard so you can see it should have routed.

Pick Strict when AFR is your primary product for active-file matters and you want every active-file lead to land directly in the AFR module with the AFR-specific triage workflow (the seven-item acceptance checklist, the structured decline reasons, the three pathways plus Custom). Pick Soft when you handle active-file matters through the generic intake-first workflow (for example, when you triage everything through the same dashboard and convert later, or when your AFR module is configured as Premium-only and your Basic-tier visitors should not be routed there). The setting affects the prospect's experience directly — switch it deliberately, and re-think the routing whenever you change your AFR or Intake-Form product positioning.

Settings: matter categories you do not handle

The second card on the settings page lets you hide matter categories your practice does not accept. A visitor who comes to your intake form for a matter type your firm rejects (for example, a refugee claim when your practice is strictly business immigration) wastes both their time and yours. Ticking a category here hides it from the step-seven matter-category picker on the public wizard. The catch-all option (I am not sure) is always available regardless — a visitor whose matter falls outside every disabled category and every enabled category still reaches you, and your reply tells them whether you can help.

Ticking a category does not delete or hide existing submissions in that category — only the public wizard's category picker is affected. Tick deliberately. The available categories mirror the ten branch list above: Permanent residence, Temporary residence (visit, study, work), Citizenship, Refugee or asylum matter, CBSA enforcement / removal / detention / inadmissibility, IRB hearing / appeal / tribunal matter, Employer / LMIA / work permit support, plus Urgent and Coming soon as configurable on-off categories of their own. The dashboard list filter still shows every category regardless of whether you have disabled it; the disable only affects what new visitors can pick.

Settings: thank-you message

The third card on the settings page lets you override the thank-you message shown to visitors after they submit. The default is short and platform-flavoured (Thank you for reaching out. We will be in touch within two business days.); leaving the override blank uses that default. When you set the override, you write your own English and Quebec French text — plain text, line breaks preserved, up to two thousand characters per language. The custom message replaces the default on the submission-success page; it does not appear in the notification email you receive (that one is for you, with the lead summary).

Use the custom thank-you to set expectations the way your firm wants. A common pattern: state your typical response time (we reply within forty-eight business hours on weekdays, longer on weekends and holidays), point to your booking page if the prospect wants to schedule a paid consultation directly, link to the firm's privacy policy, and warm the relationship with a single sentence in your firm's voice. The Quebec French version is not a literal translation of the English; treat them as two independent messages calibrated for each language community. Keep both versions short — the prospect just submitted a long form and is not in the mood for a long message.

Settings: extra notification recipients

The fourth card on the settings page lets you CC up to five additional email addresses on every new-submission notification. The primary recipient (the firm's main intake address, configured at the firm level) is unaffected and always receives the notification. The extras are useful when an assistant, a co-counsel, or a senior team member needs to see new leads in real time without logging into the dashboard. Add an address with the Add button or by hitting Enter; remove an address with the small × on the chip. Email addresses are normalized to lowercase and trimmed; duplicates are silently ignored.

The CC list applies to every new-submission notification, including the ones flagged urgent. If you want a teammate to see only urgent leads, do not use this card — instead, set the urgent subject prefix below and have your teammate set a mail-rule that filters on the prefix. The CC list is not a substitute for the role-based dashboard access your teammates already have via their seat assignments; it is a notification fan-out, not a permissions grant. Removing an address takes effect on the next notification fired; submissions already in flight when you remove the address still go to the removed recipient.

Settings: urgent lead subject prefix

The fifth card on the settings page lets you set an optional prefix that gets prepended to the notification email subject when a submission scores as high urgency (urgency score three or four — typically deadline-bearing matters: refusal letters, removal orders, PFLs, detention reviews). The prefix is plain text up to eighty characters; the common pattern is something short and bracket-wrapped like [URGENT], [TIME-SENSITIVE], or [RUSH]. The prefix is the simplest possible signal for your inbox triage rules — set an Outlook rule or Gmail filter that watches for the prefix and flags or forwards or highlights matching messages.

Pair the urgent subject prefix with the CC list above for a complete inbox-triage setup: every new submission CCs your team, and the urgent ones carry a distinctive subject prefix that your team's inbox rules surface as priority.

The prefix only fires on urgency score three or four; lower-urgency submissions get the default subject (a generic 'New intake submission from <name>' line). The threshold is fixed at three by design — if it were lower, every submission would be 'urgent' and the prefix would lose its signal value. If you find too many submissions getting the urgent prefix, audit your service catalogue and matter-category mappings: an over-eager urgency score is usually a sign that your typical matter scope tracks too closely to the urgent-fast-path pattern.

Premium: AI document analysis

On Premium tenants, the contact step and every family-member row offer an optional AI document upload widget. The prospect drops a passport bio page, an IRCC application receipt, a refusal letter, a supporting evidence package, or any other relevant document. The platform runs the upload through Gemini 2.5 Flash with a structured-output prompt that extracts the document type (passport / refusal letter / receipt / other), the name on the document, the date of birth, the country of issue, the document number, the expiry date, and any other immigration-relevant fields the document type carries. The extraction populates the contact form fields (full name, date of birth, country of citizenship) directly, with each extracted value showing as a confirm-or-edit chip the prospect ticks before continuing.

The AI extraction is a typing-saver and a readiness-score booster, not a verification step. The prospect is responsible for confirming the extracted values; the wizard does not block submission if the AI got something wrong. Your dashboard's lead summary surfaces the AI extraction as a Premium card on the submission detail page so you can see what the AI read against what the prospect typed; mismatches between the two are sometimes signals (an AI-extracted name that does not match the typed name might indicate a recent marriage, an alias, or a transcription error on a non-Latin passport). The extraction respects the same fifty-megabyte per-file cap and one-hundred-fifty-megabyte total cap as the rest of the intake; uploads larger than that are rejected at the client side before the AI extraction step.

> **Premium**: AI document analysis counts toward your tenant's shared daily AI usage quota, the same pool that powers the in-dashboard AI Assistant, the Service Agreement AI Populate, the Co-Counselling Agreements AI Populate, and the rest of the platform's AI surfaces. Premium tenants get the larger quota; Basic tenants do not see the AI upload widget at all (Basic tenants can still complete the wizard manually, just without the AI typing-saver).

Premium: multilingual wizard

The intake wizard is bilingual English plus Quebec French out of the box on every tier. Premium tenants additionally unlock runtime translation into eight more languages: Spanish, Simplified Chinese, Punjabi, Arabic, Hindi, Tagalog, Urdu, and Farsi. The translation happens at request time through Google Translate against the same canonical English source the platform uses for every client-facing surface, so the wizard's vocabulary stays consistent with the booking page, the Active File Review intake, and the rest of the public-facing surfaces. The visitor picks a language from the wizard's header dropdown (or arrives with the ?lang= URL parameter set); their choice is remembered in a lang cookie for their next visit.

The runtime translation is good for everyday immigration vocabulary but is not a sworn translation. The wizard renders a small disclaimer at the top of the page in any non-English, non-French locale so the prospect understands the translation is machine-generated. Submitted answers come back to you in the original language the prospect typed (the English-language fields in the wizard render their labels translated, but the prospect's typed text in those fields stays untouched). When you respond, you respond in whatever language is appropriate for your relationship with the prospect — usually the language they typed in, sometimes the language they selected for the wizard chrome.

Active File Review handoff via prefill token

When you click Send to Active File Review on a submission's action card, the platform mints a five-minute HMAC-signed prefill token and redirects the prospect's browser to your firm's Active File Review intake URL with the token appended as a query parameter. The AFR intake page reads the token, verifies the HMAC signature against the platform's master encryption key (so a tampered token will not resolve), looks up the source intake submission, decrypts the relevant fields under your tenant data-encryption key, and pre-populates the AFR intake form with the client identity, the matter framing, the file-status answers, and any uploaded documents already attached to the intake submission. The prospect sees their answers carry across; they do not re-type anything.

The five-minute window is deliberate. Long-lived prefill tokens are a phishing risk — anyone who intercepts the URL during that window could submit on behalf of the prospect — so we mint a short-lived token specifically for the redirect and expire it the moment it is used. If the prospect's browser somehow loses the token before completing the AFR intake (a session timeout, a closed tab, a forgotten link from yesterday), they can always come back through the Active File Review intake URL directly and re-key their answers; the source intake submission remains in your dashboard with the AFR-recommended status carried forward.

Intake PDF and auto-save to Drive

Every submitted intake produces a server-rendered PDF that captures the wizard answers, the family roster, the matter framing, the deterministic lead summary, and the list of uploaded documents (filenames only — the document bytes are not embedded in the PDF for size reasons; they remain downloadable from the submission detail page). The PDF is bilingual when the wizard was rendered in a non-English locale (the prospect's answers in the original language, your firm's headings in both English and the wizard's display language). It uses your firm's logo and branding from the company profile, so the document you hand to a client or upload to IRCC looks like it came from your firm and not from a generic platform template.

When your firm has connected its Google Drive or Microsoft 365 OneDrive (the same Drive connection your Transfer Room module uses), the platform best-effort auto-saves the intake PDF to a fixed folder structure: RCIC

App / Intake Forms / YYYY-MM-DD. The date subfolder uses UTC for consistency. The auto-save runs in the background after the submission lands in your dashboard; if the Drive connection is in a reauth-required state or the save fails for any reason, the submission still lands in your dashboard intact with the PDF available via Download — the Drive save is a convenience, not a critical path. Once the PDF lands in your Drive, it lives there independently of the platform; you can move it, rename it, attach it to a Drive-based case folder, or pull it into your firm's preferred document management system without re-routing through the platform.

> **Note**: If you have not connected a Drive yet, do so from Settings -> Drive Settings. The platform supports both Google Drive and Microsoft 365 OneDrive; the connection is shared across modules (Intake Forms, Transfer Room, Secure PDF Tools Save to Drive, and any future Drive-aware surface). Drive connection state is per-firm, not per-member — once your Owner connects it, every team member's actions that auto-save to Drive use the same connected account.

Save to Drive lands in the prospect's Pre-SA folder

When your firm has Google Drive or OneDrive connected, every **intake submission** carries a Save to Drive button. Click it and the platform renders a PDF of the current record, finds the prospect's folder under **RCIC App / Pre-Service Agreement / {Prospect Name} - {Email}/**, and uploads the PDF there. If the prospect doesn't have a folder yet, the platform creates one; if they do, the existing folder is reused so every pre-SA document for that prospect lands in one place.

The same prospect's records from Booking Notes, Service Proposals, and Intake Forms ALL share one folder per drive provider. The dedup key is the prospect's email address (lowercased + trimmed). When a prospect doesn't have an email yet, their folder gets a **(no email)** suffix; filling in the email on a later save renames the existing folder in place rather than orphaning it and creating a duplicate. Same applies if you correct a typo in the prospect's name — the existing Drive folder is renamed, every file inside is preserved.

If you edit a prospect's email to match a folder that ALREADY exists for another saved record (e.g. you saved a booking note under **(no email)** a week ago, then made a Proposal under the prospect's email, then went back to the booking and filled in the email), the platform merges the two records onto the existing email-matching folder. The earlier **(no email)** folder is left in Drive untouched for your audit trail — you can prune it manually if you'd like.

The button is disabled when Drive isn't connected (with an inline link to the Drive settings page) and when the connection is flagged for reconnect. Connecting Drive is an Owner-only setting; once it's connected, every team member with access to the source record can save to it.

> **Privacy note.** The PDF the platform uploads stays inside your tenant's drive — the prospect never sees it (this is an internal record-keeping artifact, not a prospect-facing document). The originals stored in the platform's database are encrypted at rest under your tenant's data-encryption key; the PDF lives in your drive under your firm's own access controls.

Encryption and the audit ledger

Every PII field collected by the intake wizard is encrypted at rest under your tenant data-encryption key (DEK), wrapped under the master key-encryption key (KEK) that lives in our environment variables, not in our database. Encrypted columns include the client name and email, the typed phone, every family-member name, every uploaded document filename, the matter description and any free-text branch answers, the AI extraction output (when Premium AI document analysis ran), and the decline reason notes. Email columns additionally carry blind-index hash columns so we can run exact-match lookups (find this intake by client email) without ever decrypting the canonical value.

The uploaded documents land in a dedicated private storage bucket with no public read policy, encrypted under the tenant DEK before upload and decrypted server-side on a per-request basis when an authorized actor (you or your team member with access) downloads through the dashboard. The platform never sees plaintext file content; even an attacker with full database and storage access cannot read intake documents without also obtaining the master KEK from our environment variables.

The audit ledger records every state change on an intake submission: created, opened (when a team member first views the submission), status changed (new -> under review -> converted / declined / archived), AFR handoff initiated, SA conversion completed, document downloaded, document deleted, decline reason recorded. Each row carries a timestamp, the actor (your user id, the prospect for the create event, or the cron for automatic transitions), an IP address redacted to /24, and a JSON payload with the structured details. The ledger is INSERT-only at the database level: a Postgres trigger raises on any UPDATE attempt, even from the platform service role, so the ledger is tamper-evident.

Integrations with other modules

Intake Forms sits near the head of every multi-module workflow on the platform. A prospect submits an intake, your dashboard surfaces the lead summary, you decide what to do next, and the next module picks up where the intake left off. The IF-YYYY-XXXXXX reference threads through every downstream module via the Start-from-code pattern, so client identity, matter framing, family roster, and uploaded documents never get re-keyed at any handoff. When you operate a multi-module practice (Intake -> Service Agreement -> Bill -> Transfer Room -> deliverable), the intake is where the client identity thread begins.

- Active File Review: the closest integration. The Strict routing mode redirects active-file visitors to AFR with a five-minute prefill token; Soft mode lets them continue in Intake Forms with an AFR-recommended badge. Every AFR matter that started as an intake carries source_kind = intake_form back to the source submission.
- Service Agreements: the Start-from-code surface on /dashboard/agreements accepts the IF-YYYY-XXXXXX reference and seeds a fresh SA draft with the intake's client identity, family, matter framing, and uploaded documents. The seeded SA carries source_kind = intake_form back to the source.

- Service Proposals: when you want to send a multi-option proposal to the prospect before drafting an SA, convert the intake to a Service Proposal via the Bookings Notes Make-a-Proposal hand-off (Phase 58) or by manually opening the SP Builder with the intake's client identity pre-populated.
- Bookings: a tenant who runs a paid-consultation-first workflow can link the intake URL on the booking confirmation page so prospects pre-complete the intake before the consultation. The Booking Notes Send-the-Intake-Form hand-off (Phase 58) also seeds an intake-form submission with status='invited' from inside a booking.
- AI Support: the intake wizard's AI document analysis counts toward your shared daily AI quota — the same pool that powers every AI-assisted surface on the platform. Premium tenants get the larger quota; the in-dashboard AI Assistant can answer questions about your intake submissions just like it does for any other module.
- Drive (Google or Microsoft 365 OneDrive): the intake PDF auto-saves to RCIC App / Intake Forms / YYYY-MM-DD on best effort. The connection is shared across modules — the same Drive that Transfer Room and Secure PDF Tools use.

If your practice runs the full multi-module workflow, the design intent is: prospects acquire through Intake Forms (or directly through Bookings for known clients); active-file matters route to Active File Review; non-active-file matters convert directly to Service Agreements via Start-from-code; the SA's fully-signed event provisions a Transfer Room for the ongoing file exchange; the auto-bill at fully-signed flows through Single Bills; deliverables and ongoing communication happen in Transfer Room. Five modules, one client identity, no re-keying — that is the design intent. Intake Forms is the entry point; everything else builds on the foundation it establishes.