Self-Assessments

Set up, share and review your firm's self-assessment forms, with branding, verified-email results and clear retention limits.

Up to date as of v1.32.0

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Overview and access

Self-Assessments are information-gathering forms that visitors complete through your firm's branded pages. They are included with Premium and an active Premium trial. Accounts with active complimentary Premium access can also use them. The information and estimates are not an immigration decision or a substitute for reviewing a person's circumstances.

1. Open Self-Assessments from the dashboard launcher or sidebar.
2. Use the dashboard for submissions and review requests, Library and sharing for live forms, and Email delivery for delivery status.

The forms available now

Four forms are available now: OINP Ontario Workforce Priority for workers, with an estimated Expression of Interest (EOI) score; sponsorship of a spouse, common-law partner or conjugal partner; refugee claims in Canada; and an open work permit for the spouse of a foreign worker (C41). Each form is offered in ten languages. New forms are added regularly.

1. Choose the form that matches the information your firm wants to collect.
2. The newest live version is served automatically. Historical submissions keep the version used when they were recorded.

Turn a form on or off

All live forms are on by default for firms with Premium access. An owner or RCIC can change a form's switch in Self-Assessments, under Library and sharing, then save the settings. Switching a form off stops new starts and removes its sharing links. Visitors who already started can still finish, and existing submissions and results remain available. The switch applies to the form, so it stays off when that form receives a newer version.

1. Open Library and sharing as the owner or an RCIC.
2. Change the form's switch and save. If another staff member changed the settings, reload before trying again.

Share a form

Open Library and sharing. Each live form has its own direct link, Copy button, website embed code and Preview. Paste the link into a message or social post, or paste the embed code into a website article. Shared links use the firm's logo, with the RCIC App logo as the fallback. The All assessments box shares the firm's complete live list. A form that is off has no sharing link.

1. Confirm the firm's email details before sharing. Choose a language or leave Visitor chooses selected.
2. Use the form's Copy buttons for its direct link or embed code. Open Preview to check it before sharing.

3. Upload or change the firm's logo in the firm's settings. With no logo, social previews use the RCIC App logo.

Share All assessments and use the finder

The finder asks two short questions before a form is chosen. It asks no name, and those choices are not saved. It suggests up to three matches from the firm's live forms. If nothing fits, it offers Book a consultation and the firm's Intake form when those links are available; otherwise it directs the visitor to contact the firm.

1. Use the All assessments box to share the firm's live list or embed it.
2. The finder only considers forms the firm currently offers. Its choices stay on the visitor's page and do not create a saved draft.

Change colours and introduction

From Library and sharing, open Assessment page design. Adjust the page colours and introduction, check the preview and contrast checks, then save. The colour-copy button can pull colours from the booking page. The booking designer has the reverse button. These buttons copy colours into the current draft only; they do not copy the introduction or save your changes.

1. Review the desktop or narrow preview and fix any contrast warning before saving.
2. Save the assessment design after copying booking colours. To copy in the other direction, open the booking designer and use its assessment-colour button, then save there.

Set up email details and check delivery

In Library and sharing, review the firm's display name, legal name, address, contact email, reply-to email, review email and privacy email. Choose a responsible RCIC from the list, confirm the details and save. Email delivery shows verification, results and review-acknowledgement statuses, along with holds or outcomes that

need checking. Sending starts automatically after the relevant event when the required checks permit it. A send with an unknown outcome is not automatically resent.

1. Review all seven firm fields and the responsible RCIC. Confirm that the saved information is correct.
2. If another staff member saved a different profile, use Reload saved profile, review it and confirm again.
3. Open Email delivery to read the recorded status and evidence. An email-service acceptance is not proof that the email reached the inbox.

What the visitor does

Visitors see the firm's logo and page colours, a language choice, and Book a consultation on every form page when a booking link is available. After choosing a form, they review the consent information and complete the questions. Results are held until they verify their email. They open their results through the emailed link; the unverified visitor page does not reveal the result.

1. The visitor chooses a form and language, reads the disclosures and makes the consent choices.
2. They answer the questions, save as needed, review the form and submit.
3. They verify the email address and open the emailed results link. The form and estimate are information for the firm's review.

Review a submission or request

Open Self-Assessments in the dashboard, then open a submission by its reference. Staff with the required access can see the recorded answers, result, email-verification status, activity and review requests. An estimated EOI score is information only. It does not decide a person's immigration outcome, and the firm must review the facts and current official sources.

1. Open the submission reference to read the saved answers, recorded result and activity.

2. Review requests appear with the submission. Use the request status and observations to record the firm's review.

3. Times shown in the Self-Assessments dashboard include the firm's time zone.

Privacy, retention and limits

Answers are encrypted at rest. Unfinished drafts become due after 30 days from the latest recorded activity; completed answers use 12 months from the latest submission or resolved review. Audit and evidence records use a separate three-year retention period. Daily disposal processes records only when the required checks permit it: holds, open reviews or complaints, unsettled deliveries and other protected copies can delay disposal. An unexpected failure pauses that firm's disposal and alerts the platform administrator without automatically retrying the failed item. Copies already received by the firm or held by third parties follow their own retention rules.

1. Treat a form or score as information only, not an immigration decision. Check the facts and official sources for the person's circumstances.

2. A form being switched off does not erase an existing submission. Firm and third-party copies are separate from the platform's disposal process.

The retired general form

The earlier general form has been retired from the live list and cannot be started again. Its historical submissions and results remain with the firm's records. For a new visitor, share one of the current forms or the All assessments page.

1. Use a current form for a new visitor. Do not reuse an old link to start the retired general form.