TRP Intake

Send a client a guided temporary resident permit questionnaire in eleven languages, prefilled from their agreement and from their earlier intake on the same matter, then turn their answers into a checklist and letters. A Premium module.

Up to date as of v1.32.0

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What it is

A temporary resident permit request turns on two things an officer weighs against each other: why your client needs to come to or stay in Canada, and what risk admitting them carries. TRP Intake collects your client's own account of both. You send a private invitation from a client with a signed 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 document checklist grouped by the factors an officer considers, a first-person explanation letter for the applicant, and support-letter templates for a family member, a friend, and an employer. You review and edit everything before approving it, and approval files the whole bundle to the matter's Application folder.

> **Premium**: TRP Intake is a Premium module, end to end: the form, the prefill, the client questionnaire, and the approval bundle. This is deliberately different from H&C Intake, where the questionnaire is included on every plan and only the AI needs Premium. The AI calls here also count against your daily AI allowance.

Where the answers come from before you send it

Start a TRP Intake from a client with a signed agreement. The agreement already holds their name, date of birth, contact details, and address, so those arrive proposed rather than blank. The page also shows any H&C or Express Entry intake already attached to the same matter, and offers to draw on it.

From that earlier intake, two different things happen. Structured facts are copied across field by field, exactly as stored. The narrative questions are drafted from the client's own earlier words, adapted to the question being asked. Where their prior answers do not support a question, it stays blank rather than being filled with something plausible.

Nothing is applied silently

Everything arrives as a proposal carrying where it came from and how confident we are. You accept, edit, or discard each one before the invitation goes out. The client then sees which answers came from their earlier form, and any section containing an unconfirmed carried-over answer stays marked incomplete until they confirm or change it. What they wrote months ago is a starting point, not a record they are stuck with.

What is held back on purpose

- An H&C family-violence section never flows into a TRP form at all.
- A question the client declined in the earlier form is a recorded decline, not testimony, so it is not carried over.
- A field the earlier form was not actually showing the client, because a branch had closed it, is not read either.
- The source form must belong to the same matter. A form on another matter is not read at all.

If an attached form exists but cannot be read, the page says so. That is a different message from having nothing attached, and the difference is deliberate: one means look again, the other means there was never anything there.

What the form asks

The question set follows IRCC's own program delivery instructions for temporary resident permits, so the form collects the material an assessment turns on rather than a generic questionnaire:

- Current status and immigration history, including any past non-compliance, removal, or refusal.
- The compelling need to enter Canada or to remain, in the client's own facts, with how long they need and what happens at the end of it.
- Criminality, only where it applies: what happened, what the sentence was, whether it has been completed, and what has changed since.
- Health, only where it applies: the condition, the treatment expected in Canada, and how it would be paid for.

Nothing asks the client to argue law or predict an outcome. They describe what happened and what they need; the submissions stay yours to write.

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.

Answers are stored independently of the language they were typed in, so the checklist and the letters come out in the language you choose when you generate them, whichever one the client answered in.

Sections a client may decline

Criminality and health are asked about because they bear directly on a permit request. A client may not be ready to write about either in a web form, so each section opens with a plain explanation of why it is being asked and can be declined outright.

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

- Your view 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 checklist and the letters

Once the client has submitted, Generate produces the bundle. Approval is one gate: you read and edit everything, then approve the set.

- The document checklist (PDF), bilingual, grouped by the factors an officer considers, 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.
- Support-letter templates (Word) for a family member, a friend, and an employer.

What the checklist will not do

It lists documents and says why each is relevant. It does not weigh them, score the request, 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.

> **Important**: Nothing generated here raises risk on return. A permit request is assessed without protection-related risk, so building the case on it would point the whole bundle at the wrong test. If that is the real issue in your matter, it belongs in a different application.

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. It is a Word file so you can edit it. 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 someone else'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. The employer template is here because a large share of permit requests are about someone who needs to travel to Canada for work, and their employer is best placed to say why the trip matters and when it ends.

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 and files the completed questionnaire as a PDF into the matter's client documents folder. 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.

Approving files the bundle automatically to the matter's Application folder on every connected drive. Filing is queued rather than immediate, so the documents usually appear within a few minutes, and the notice after approval tells you how many were queued. If it says none were, it also says which problem it was: no eligible drive, or a filing step that failed.

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.