

General Information

What type of form? Membership app

Static or Dynamic? Static

Do we need to re-create it into an editable format? No

Does the data need to be validated? No

Any file uploads for the form? Yes

Please provide full name, email and access level

Public or Private? Public

Do you have an existing document to work from? Yes

How often will new data be supplied to be refreshed? NA

If yes, then which fields? NA

How many back-end users?

Do you want PDF, CSV or just email data reporting?

PDF, CSV

Intake (Portal)

Would you like a Submissions Portal?

Yes

Do you want users to be able to delete submissions?

No

Any custom requests or features?

Do you want users to be able to edit submissions?

No

Do you want users to select statuses?

Yes

Intake (Notifications)

Thank You page upon submission?

Yes

For either, please indicate page

User email?

Yes

Admin email?

Yes

Please specify to which user

Any attachments to outgoing emails?

If yes, which emails and to whom?

For Membership Forms

How many joints members?

1

How many beneficiaries?

2

How should we structure backup withholdings verbiage?

Like ILWU

General Notes

General notes

- * US citizen: Valid
- * Non-US citizen: green card + foreign passport + valid US
- * If address doesn't match, then require utility bill or proof of residence
- * Employer name + occupation
- * Add note about last known occupation
- * Minor can apply, but parent has to be joint
- * POD = 2; SSN optional
- * share + checking
- * esign + disclosures

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Date Submitted	09-13-2021 5:22:56 pm
Submitter's IP Address	142.44.84.19
Submitter's Username	
Submitter's User ID	0
Language Code	en-GB
Confirmed	Yes
ID	1240
