"Who" section copy

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(Versions B, C, D TK in future sprint)

## Reference

[Form content mapping Mural](https://app.mural.co/t/gsa6/m/gsa6/1724874448184/3088b05b720a9ca36b74d5d121e2054322372262?sender=u9ac43edf54de743b3d9b2405)

[Version flow Mural](https://app.mural.co/t/gsa6/m/gsa6/1726172559221/fde0b6672ae842ac183c6208be5394e957455714?sender=u9ac43edf54de743b3d9b2405)

## Legend

Section headings

Introductory copy

**Questions**

*Explanations of questions*

fillable field

🔘 response option

| Content that’s relevant only to users who select the preceding checkbox |
| --- |

Gray text = notes / not form text

## Definitions

| **Term** | **Have a draft/FPO definition?** | **Have a USFS definition?** |
| --- | --- | --- |
| Corporation |  |  |
| Private corporation |  |  |
| Public corporation |  |  |
| Partnership or association |  |  |
| Employee |  |  |
| Authorized agent |  |  |
| Parent company |  |  |
| Articles of incorporation |  |  |
| Corporation bylaws |  |  |
| Letter of good standing |  |  |
| Resolution authorizing filing |  |  |
| ~~(Shareholder information terms~~ |  |  |

## Questions/open items

For SMEs:

* Handbook ([12.11.a](https://docs.google.com/document/d/17Nuxmp1wqYb4OIWzulPxtN43jW3EVWLy9DWJt7eE2RE/edit), #2) lists various supporting documentation that can be required at the admin’s discretion. Some of the things on this list are mentioned on SF-299 in a way that makes them appear mandatory. Some of the things aren’t mentioned on SF-299 at all. Which should be prompted for in our prototype? **Include shareholder question, SMEs want info up-front**
  + Especially: Shareholder documentation

For future work:

* File upload feature
* Adding previous permits: change from list separated by commas to individual entry fields
* Is point of contact address necessary for all points of contacts, or only for those submitting the form as an individual? (i.e., those who won’t enter an address under “applicant information”)
* Is applicant email/phone number necessary (in addition to point of contact email/phone)?
* Consider consolidating the parent company question on prototype page 2 with the supplemental documentation on prototype page 3, ideally without introducing additional conditional logic.
* Revisit question of including examples of supplemental documentation on prototype page 3. In discussion, SMEs uniformly did not want to include examples: they were concerned that examples would be misused by form-fillers as templates, or would cause confusion due to the fact that some of this how this documentation looks varies significantly from state to state. However, we haven’t asked this question of users.
* Confirm all definitions with USFS
* Inclusive and accessible language review
* Plain language review

## Prototype content

#### PROTOTYPE SCREEN 1: Start here

**Who should the Forest Service contact about this proposal?**

*Enter contact information for the person who will work with the Forest Service during the proposal screening process.*

point of contact name

point of contact email

point of contact phone number

point of contact address

**If the proposal and application are successful, who will hold the permit?**

*The legal entity that would hold the permit is the applicant. This could be an individual or an organization.*

🔘 Me. I'm filling out this form for myself, as an individual or sole proprietorship.

🔘 Another entity. I'm filling out the form on behalf of an organization.

| **What kind of organization is it?**  🔘 Corporation  *A corporation is an organization incorporated under the laws of the state in which it is located. This includes both for-profit and not-for-profit corporations, as well as C corporations, S corporations, and Limited Liability Companies (LLCs).*   | **What type of corporation?**  🔘 Private  *A company is privately held if it is not traded on a stock exchange.*  🔘 Public  *A company is publicly held if it is traded on a stock exchange.* | | --- |   🔘Partnership or association  *A partnership is the relationship between two or more people to do trade or business. Each person contributes money, property, labor or skill, and shares in the profits and losses of the business.[[1]](#footnote-0)*  🔘Government agency   | **What type of agency?**  🔘 Federal agency  🔘 State government or agency  🔘 Local government or agency  🔘 Tribal government  🔘 Other | | --- | |
| --- | --- | --- |

[Continue](#_1m8wo7os9ac)

##### Conditional logic

| **If user has selected** | **Then continue to** |
| --- | --- |
| Me. I'm filling out this form for myself, as an individual. | Submit page |
| Another entity. I'm filling out the form on behalf of an organization.  AND Corporation | Prototype page 2, Version A |
| Another entity. I'm filling out the form on behalf of an organization.  AND (Partnership or association OR Government agency) | Prototype page 2, Version B |

#### 

#### PROTOTYPE SCREEN 2: Applicant information

##### Conditional logic

| **If user has selected** | **Then display version** |
| --- | --- |
| Privately held company | A (copy below) |
| Publicly held company | B (future sprint) |
| Partnership or other unincorporated entity | C (future sprint) |
| Government agency | D (future sprint) |

##### Text variable

| **If user has selected** | **Then** entity type **is** |
| --- | --- |
| Corporation | corporation |
| Partnership or association | partnership or association |
| Government agency | government agency |

##### Version A (corporations)

You told us that you are filling out this form on behalf of a entity type.

**Fill in the contact information for that entity type.**

*Enter the full registered legal name of the entity type that will hold the permit if the proposal and application is successful. Do not enter any other name, such as a DBA (“doing business as” name).*

applicant name

applicant email

applicant phone number

applicant address

**Are you an employee of this entity type?**

*Consultants or contractors working on behalf of a client company should answer “no.”*

🔘 Yes

🔘 No

| * **Additional documentation for consultants**   *Provide a signed and dated letter from your client confirming that you are authorized to complete this form on its behalf.*  *View an example* |
| --- |

**Are you an authorized agent of this entity type?**

*An authorized agent is a person with formal authority to sign contracts on behalf of that* entity type. *An authorized agent must be at least 21 years old.*

🔘 Yes

🔘 No

**Does this entity type have a parent company?**

*A parent company is a company that controls other companies, or subsidiaries. A parent company is also known as a holding company.*

🔘 Yes

| **Fill in the contact information for the parent company of this entity type?**  parent company name  parent company email  parent company phone number  parent company address |
| --- |

🔘 No

**Does this entity type, or its parent company, hold other permits with the Forest Service?**

🔘 Yes

| **Fill in the permit numbers separated by commas.**  open note field |
| --- |

🔘 No

🔘 I’m not sure

[Continue](#_mayqkzsuhzf8)

| **If user has selected** | **Then continue to** |
| --- | --- |
| (All users) | Page 3 of “Who section” |

##### Version B (partnerships and associations; government agencies)

You told us that you are filling out this form on behalf of a entity type.

**Fill in the contact information for that entity type.**

applicant name

*Enter the full registered legal name of the entity type that will hold the permit if the proposal and application is successful. Do not enter any other name, such as a DBA (“doing business as” name).*

applicant email

applicant phone number

applicant address

**Are you an employee of this entity type?**

*Consultants or contractors working on behalf of a client company should answer “no.”*

🔘 Yes

🔘 No

| * **Additional documentation for consultants**   *Provide a signed and dated letter from your client confirming that you are authorized to complete this form on its behalf.*  *View an example* |
| --- |

**Are you an authorized agent of this entity type?**

*An authorized agent is a person with formal authority to sign contracts on behalf of that* entity type.

🔘 Yes

🔘 No

**Does this entity type hold other permits with the Forest Service?**

🔘 Yes

| **Fill in the permit numbers separated by commas.**  open note field |
| --- |

🔘 No

🔘 I’m not sure

[Continue](#_mayqkzsuhzf8)

| **If user has selected** | **Then continue to** |
| --- | --- |
| (All users) | Page 3 of “Who section” |

#### 

#### 

#### PROTOTYPE SCREEN 3: Applicant information—Supporting documentation

| **If user has selected** | **Then display version** |
| --- | --- |
| Privately held company | A (copy below) |
| Publicly held company | B (future work) |
| Partnership or other unincorporated entity | C (future work) |
| Government agency | D (future work) |

#### 

##### Version A (private corporations)

The Forest Service needs certain documents to confirm that the applicant is eligible to receive a special-use permit.

Submitting these documents together with your SF-299 form may help the Forest Service review your proposal more quickly. However, you may choose to provide some or all of these documents later in the proposal process.

Here are the documents that the Forest Service will need from your entity type before issuing a special-use permit.

* **Articles of incorporation**

*Articles of incorporation are a document submitted in order to formally register a business with a state. The document typically includes information such as the business’s name, members, and purpose. In some states, this document may be called a “certificate of formation.”*

* **Corporation bylaws**

*Corporation bylaws are a document stating the rules that govern the management and operation of a business. The document is typically signed by the company’s board of directors at the time of its founding.*

* **Certificate of good standing**

*A certificate of good standing is a document stating that a corporation is approved to conduct business. You will need a certificate of good standing from each state in which the permitted activity would occur.*

* **Resolution authorizing filing**

*A resolution authorizing filing is a formal document, signed by the corporation’s board of directors, stating that specific corporate officers are allowed to sign contracts on behalf of a corporation.*

* **Shareholder information**

*For each shareholder owning 3% of shares in the corporation, provide:*

* *The shareholder’s name*
* *The shareholder’s address*
* *The number and percentage of the shareholder’s voting shares*
* **Affiliate information**

*For each affiliate of the corporation, provide:*

* *The affiliate’s name*
* *The affiliate’s address*

*For each affiliate that is controlled by the corporation, either directly or indirectly,* ***also*** *provide:*

* *The number and percentage of voting shares in that affiliate owned by the corporation.*
* **Parent company information**

*If the corporation is controlled by a parent company, provide:*

* *The number and percentage of voting shares in the corporation that are owned by the parent company.*

[Review and submit your information](https://docs.google.com/document/d/1cyro-bvsv7U-EbtPSUlefmmZUh9ybZFOsMsZ5WplEyI/edit#heading=h.kts4iz17hfx4)

| **If user has selected** | **Then continue to** |
| --- | --- |
| (All users) | [Submit page](https://docs.google.com/document/d/1cyro-bvsv7U-EbtPSUlefmmZUh9ybZFOsMsZ5WplEyI/edit#heading=h.kts4iz17hfx4) |

#### 

Unused copy for future reference

##### Example of supplemental document copy w/ upload feature

**Articles of incorporation**

*Articles of incorporation are a document submitted in order to formally register a business with a state. The document typically includes information such as the business’s name, members, and purpose. In some states, this document may be called a “certificate of formation.”*

*View an example*

🔘 I will upload this document now.

| **[Open upload dialogue]** |
| --- |

🔘 I will provide this document at a later date.

🔘 I have already provided this document to the Forest Service.

| 🔘 I provided this document as part of a previous permit application.  permit number  🔘 I provided this document another way.  open note field |
| --- |

##### Citizenship question—oil/gas only; not applicable to broadband

**The following question is required only if you are applying for a permit on behalf of yourself, or on behalf of a partnership or other unincorporated entity.**

**Are you a citizen of the United States?**

🔘 Yes

🔘 No

1. IRS: <https://www.irs.gov/businesses/partnerships> [↑](#footnote-ref-0)