SATYAGRAHA INSTITUTE

Application Tracking System

Key Screens and Artifacts

Abhay Mistry
UX Designer

Context

Satyagraha Institute is a nonprofit based in South Dakota, USA. They host a nonviolence training program once per year in 3 - 4 countries. Those who are interested in participating must complete an application and pay various fees.

The current application system for Satyagraha Institute is cumbersome for both applicants and the coordinators who review the applications. Applicants must navigate through a convoluted series of steps to submit their application while coordinators are required to autonomously keep all materials organized, potentially resulting in misplacement and general disarray.

College application software is too complex and job application software delivers within the wrong scope. Basic form applications like Google Forms and Typeform lack several crucial features.

Challenge

Since no existing application platforms fulfill the Institute's needs, the challenge is to create an MVP of a comprehensive application system that allows:

1. Applicants to have full control and visibility over their complete application within a singular platform throughout the entirety of the process.

2. Coordinators to efficiently communicate with applicants and keep application materials organized.

Satyagraha Institute has the goal of becoming a "premiere" training center for nonviolence. Its internal infrastructure should be one of many facets that reflect such a vision.

Exploratory Research Plan

Client: Satyagraha Institute
Project: Application management system
Researcher & Designer: Abhay Mistry - IT Strategist & Designer at Satyagraha Institute

Summary:
Satyagraha Institute is a nonprofit based in South Dakota, USA. They host a nonviolence training program once per year in four countries (and growing). Those who are interested in participating must complete an application and pay various fees.

The current application system for Satyagraha Institute is severely cumbersome for both applicants and the coordinators who review the applications. Applicants must navigate through a convoluted series of steps to submit their application while coordinators are required to autonomously keep all materials organized, potentially resulting in misplacement and general disarray.

College application software is too complex and job application software, while slightly more relevant, delivers within the wrong scope.

Unvalidated Problems with Current Application Process:
All problems below are based on cursory observation. They should be viewed as conjectures.

Applicants: Almost every part of the application process occurs in disparate locations.

1. Main application - Typeform
2. Application fee - within Typeform or main website
3. Letters of recommendation: applicant sends email to references asking for recommendation
4. Deposit/Program Fee: Donation page on main website

Notes: No way for applicant to save application after submission. No way to save application progress and return later. Potential problem: language barrier.

Coordinators: Applications aren't easily sortable. Communication can be difficult to keep track of. Difficult to pass coordinator role on to the subsequent year's since nearly every part of the application process is managed through email. Essentially, though materials aren't quite as separated for coordinators as they are for applicants, they're still difficult to manage through email alone.

Challenge:
Since no existing application platforms fulfill the Institute's needs, the challenge is to create an MVP of a comprehensive application system that allows:

1. *Applicants* to have full control and visibility over their complete application within a singular platform throughout the entirety of the process.
2. *Coordinators* to efficiently communicate with applicants and keep application materials organized.

The system should be optimized for multiple device sizes, as lesser developed regions experience heavier tablet and mobile phone use, and take multiple cultures into account.

Satyagraha Institute has the goal of becoming a "premiere" training center for nonviolence. Its internal infrastructure should be one of many facets that reflect such a vision.

Stakeholders: Carl, Lois, Satyagraha Institute coordinating committee, former participants and past and present coordinators

Research Goals:

1. Understand goals, behaviors, motivations, attitudes and frustrations of applicants and coordinators (target users) [people]
2. Understand how and why target users use specific technology/software (mental models) [people and research]
3. Understand cultural and socioeconomic contexts of target users [people and research]
4. Understand target users' past experience with comparable programs, especially their onboarding experience [people]
5. Validate problems outlined above [people]

Research Methods For Each Goal:

1. Semi-structured interviews, stakeholder interviews, survey
2. Semi-structured interviews, market research, survey, competitive analysis
3. Semi-structured interviews, domain research, stakeholder interviews, survey, "cultural" analysis
4. Semi-structured interviews, survey
5. Semi-structured interviews, stakeholder interviews, survey

Participants:

5 - 7 past participants (at least one from each region)
5 - 7 potential applicants (at least one from each region)
4 coordinators (Kate, Andrea, Senyo, Carl)
1 SME? Admissions rep of university
Several individuals from Facebook group

Research questions:

1. Which applications are users most familiar with interacting?
2. Former applicants' attitude toward existing application process.
3. Andrea's (former Black Hills coordinator) attitude toward existing application process.
4. How does users' culture/environment influence human interaction and computer use?
    a. language
5. With what other programs/nonprofits have users been involved?
6. What characteristics/metrics of an applicant make them successful?
7. Core values of Institute (how should participants be treated/feel?)
8. Demographic data (from survey only)

Deliverables:

1. Product analysis
2. Cultural analysis scale
3. Coordinator problem validation
4. Task flow of current application process
   Research > Interviews > Affinity Mapping
5. Personas

6. Problem statement
7. Design principles

Unknowns: Exact number of countries, number of coordinators per country/program, retention of coordinators

Resources

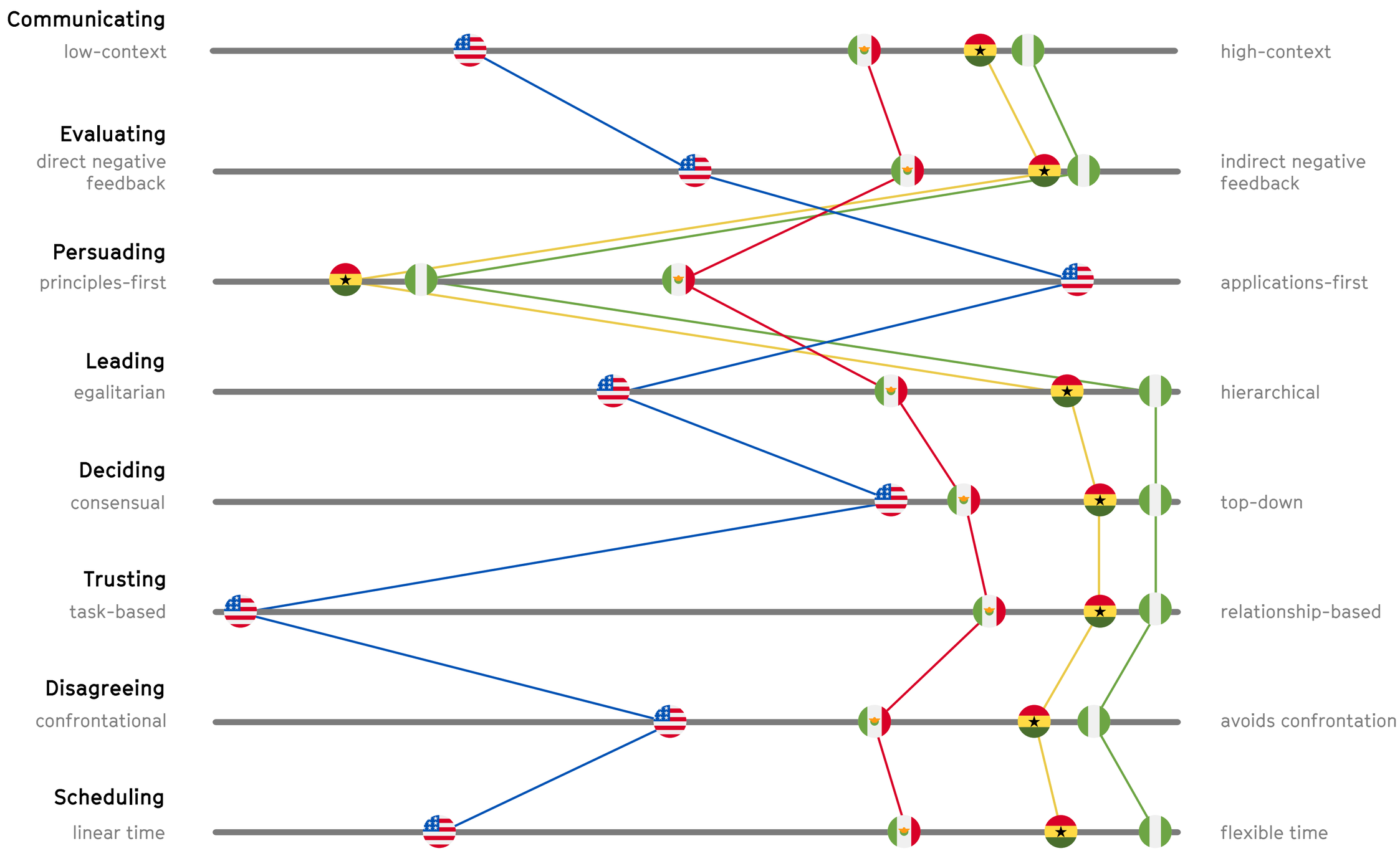
https://jtbd.info/replacing-the-user-story-with-the-job-story-af7cdee10c27

http://andrewdoherty.com/nbn-co-case-study#research-outcomes

https://hbr.org/resources/images/article_assets/hbr/1405/R1405K_A_LG.gif
https://hbr.org/2014/05/navigating-the-cultural-minefield

https://www.nngroup.com/articles/empathy-mapping/

https://qz.com/611516/more-people-use-facebook-in-nigeria-than-anywhere-else-in-africa/


Communicating
low-context
high-context
Evaluating
direct negative feedback
indirect negative feedback
Persuading
principles-first
applications-first
Leading
egalitarian
hierarchical
Deciding
consensual
top-down
Trusting
task-based
relationship-based
Disagreeing
confrontational
avoids confrontation
Scheduling
linear time
flexible time

Culture Map

Eliza Livingston

Coordinator - Black Hills

Coordinator

Age 30

Day Job Client Success Officer

Location California, USA

Languages English, Spanish

Personality

Openness

Conscientiousness

Extroversion

Agreeableness

Neuroticism

Bio

Eliza is currently a single, thirty year old client success officer in California. Following her graduation from a small liberal arts school, she immediately started working with an NGO in Latin America. The decision to pursue this opportunity was largely informed by her core values which consist of mutual aid, compassion and inner peace as well as her interest in affecting social change through direct action. She attributes most of her professional success to her exceptional organizational skills. These skills, however, cause her to set high organization and communication standards for others, often leaving her disappointed when they are ultimately unmet. Most of her current work involves high stakes direct interaction with clients.

User Goals

When Eliza electronically communicates with an applicant, she want to ensure they respond or indicate receipt of the message so she can be confident the applicant read and processed time sensitive or actionable material.

When keeping applicants organized, Eliza wants to be able to do so without referencing information on third party tools so she can work consistently and efficiently across multiple devices.

Frustrations

Unresponsiveness from people she communicates with

Getting too many notifications about one task

Too many organizational and communication tools for one project

Motivations

Social Change, Efficient Communication, Personal Growth, Learning

Devices

Apps

Felix Omowon

Coordinator - Nigeria

Coordinator

Age 35

Day Job Business Developer

Location Nigeria

Languages English, Igbo

Personality

Openness

Conscientiousness

Extroversion

Agreeableness

Neuroticism

Bio

Felix lives in Lagos with his wife and two sons. He works as a business developer for an independent firm, but he often consults for the firm's clients as well. After years of seeing and hearing about violent actions committed by governments and other extremist groups across the world, but especially around Nigeria, Felix discovered Gandhi's ideas of nonviolence. He eventually joined the first cohort of the Institute in Nigeria and later decided to become the program's coordinator during the subsequent year. Being surrounded by multiple countries has resulted in Felix being inculcated with a global mindset. Because of this, he his particular about the way information is presented to others so they can grasp it as quickly as possible.

User Goals

When Felix manages applicants from different regions, he wants to view all information in the relevant cultural format so his communication with each applicant is clear and unequivocal.

When Felix receives payments from each applicant in his country, he wants to process them within the same web app and in his own currency so he can proceed with other operations without delay.

Frustrations

Communication that is passive and unclear

Getting distracted by apps because of too many notifications

Limited app functionality caused by geoblocking

Motivations

Positively Impacting Others

Influencing local policy and the Propagation of Gandhian nonviolence

Devices

Apps

Alex Warren

The Socially Conscious Business Owner

Applicant

Age 29

Occupation Business Owner

Location Minnesota, USA

Language English

Personality

Openness

Conscientiousness

Extroversion

Agreeableness

Neuroticism

Bio

Alex is a single 29 year old who lives in a midsized Minnesotan town. He owns a bicycle shop where he both sells and repairs bicycles. Sales are generally low, but he doesn't mind because his motivations are more intrinsic, often mentioning he's just happy to have more bicycles on the streets. Alex is so personally invested in his business, he will not accept pay some months. He also takes interest in local politics by advocating for bike lanes. Unsurprisingly, Alex's primary mode of transportation is bicycle, even during the colder months. His worldview is shaped by listening to and reading independent, progressive news outlets such as The Intercept and Truthdig. Alex is generally skeptical of online services and will avoid using anything he feels violates his privacy or freedom of speech.

User Goals

When Alex works through an online application, he wants to avoid redundancy so he can finish it quickly as possible.

When applying for a program, Alex wants open ended questions so he can better express his ideas and values.

Frustrations

Intentionally convoluted and hidden functionality in apps

Redundant questions on forms

Lack of specificity and directness when communicating with others

Motivations

Ethical business practices,
Contributing to local economy,
Cooperation over competition

Devices

Apps

Emma Brown

The Academic

Applicant

Age 39

Occupation Adjunct Professor

Location Iowa, USA

Languages English, Spanish

Personality

Openness

Conscientiousness

Extroversion

Agreeableness

Neuroticism

Bio

Emma is a married 39 year old who has two kids and works as an adjunct professor at her local university. She has both a master's degree and a PhD in theology. One of her biggest frustrations is not being able to find meaningful employment within this field of study. Emma does however, stay active within the community's spiritual groups that focus on examining different faiths from an academic angle. She feels it's important to expose her kids to many cultures and ways of life so they, too, can grow up to be open minded individuals. Emma often has substantial discussions with her husband about current affairs and cultural issues.

User Goals

When something important happens, as defined by Emma, she wants to be notified outside the web app so she can take action faster.

When Emma applies for a program online, she wants to receive frequent updates about the evaluation process so she can be confident that progress is being made in an efficient manner and submit any missing materials.

When asking for letters of recommendation, Emma wants as little contact as possible so it doesn't feel like she's imposing.

Frustrations

Having to enter same information twice on forms

Being presented too much information at once

Communicating with people who use informal language within a professional context

Motivations

Educating others, leading a spiritually fulfilling life, lifelong learning, family

Devices

Apps

Kingsley Lawal

The Analytical Humanitarian

Applicant

Age 33

Occupation Coordinator of NGO

Location Lagos, Nigeria

Language English

Personality

Openness

Conscientiousness

Extroversion

Agreeableness

Neuroticism

Bio

Kingsley is a 33 year old coordinator for an NGO in Lagos, Nigeria. He started working with the NGO several years ago after meeting the executive director at a leadership conference in Lagos. The director was especially drawn to Kingsley because of his experience with leading smaller nonprofits and initiating fundraising efforts. Kingsley has a background in electrical engineering, but later decided a service oriented career would be more meaningful and have a greater impact on those who need the most assistance. He noted that one of the most transferable skills he attained during his engineering career was analytical thinking. This skill has helped Kingsley solve complex logistical problems with the NGO. Kingsley especially enjoys his time with the NGO because of the relationships he forms. He often states his relationships are what give his life the greatest meaning.

User Goals

When Kingsley completes an application, he wants to receive feedback so he can improve his responses in the future.

When Kingsley works through a long online form, he wants to be able to save his responses so can finish later.

Frustrations

One way conversations

Forms that take too long to complete

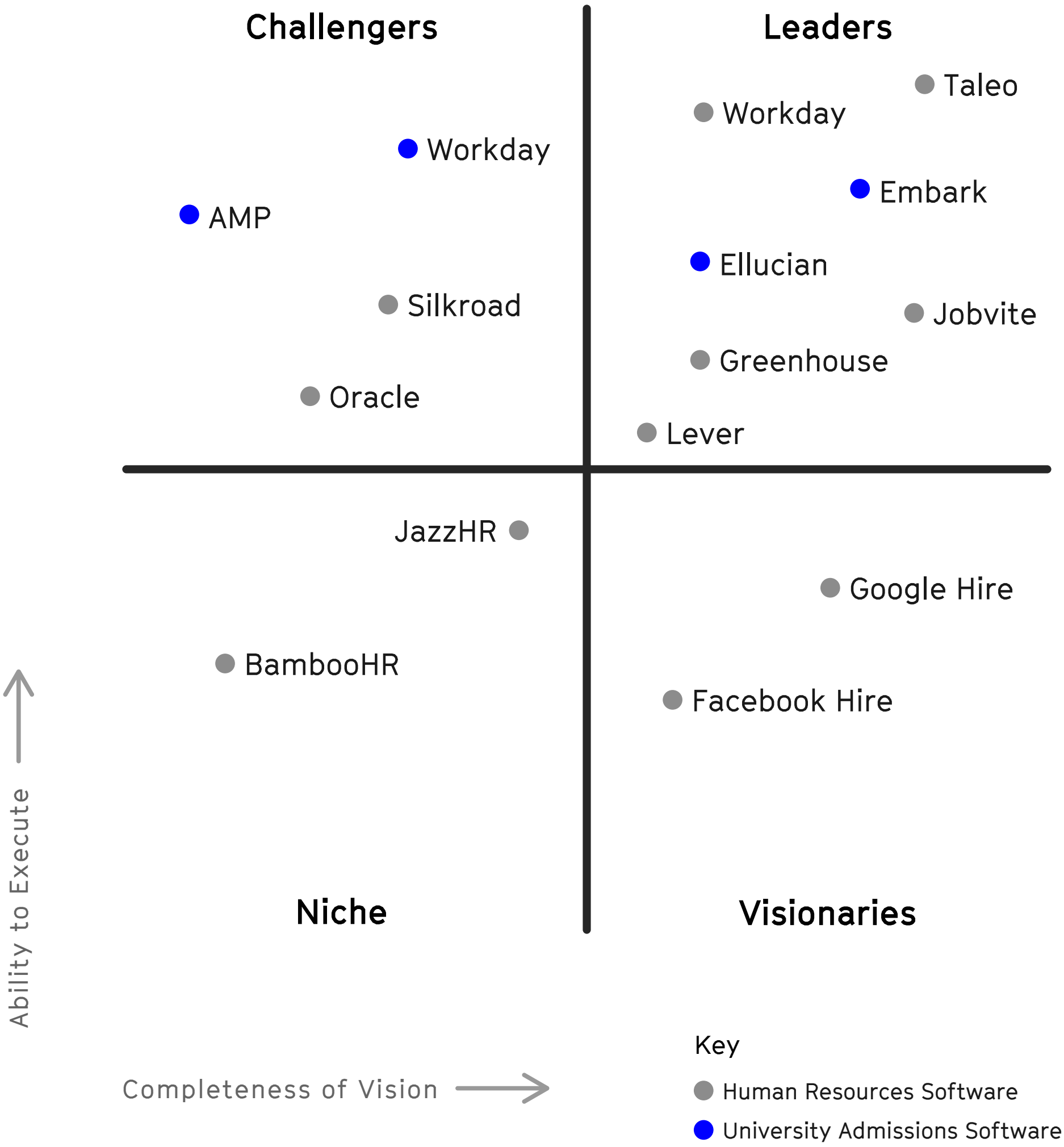
Impersonal communication

Motivations

Directly impacting those in need, financial stability, cultivating relationships

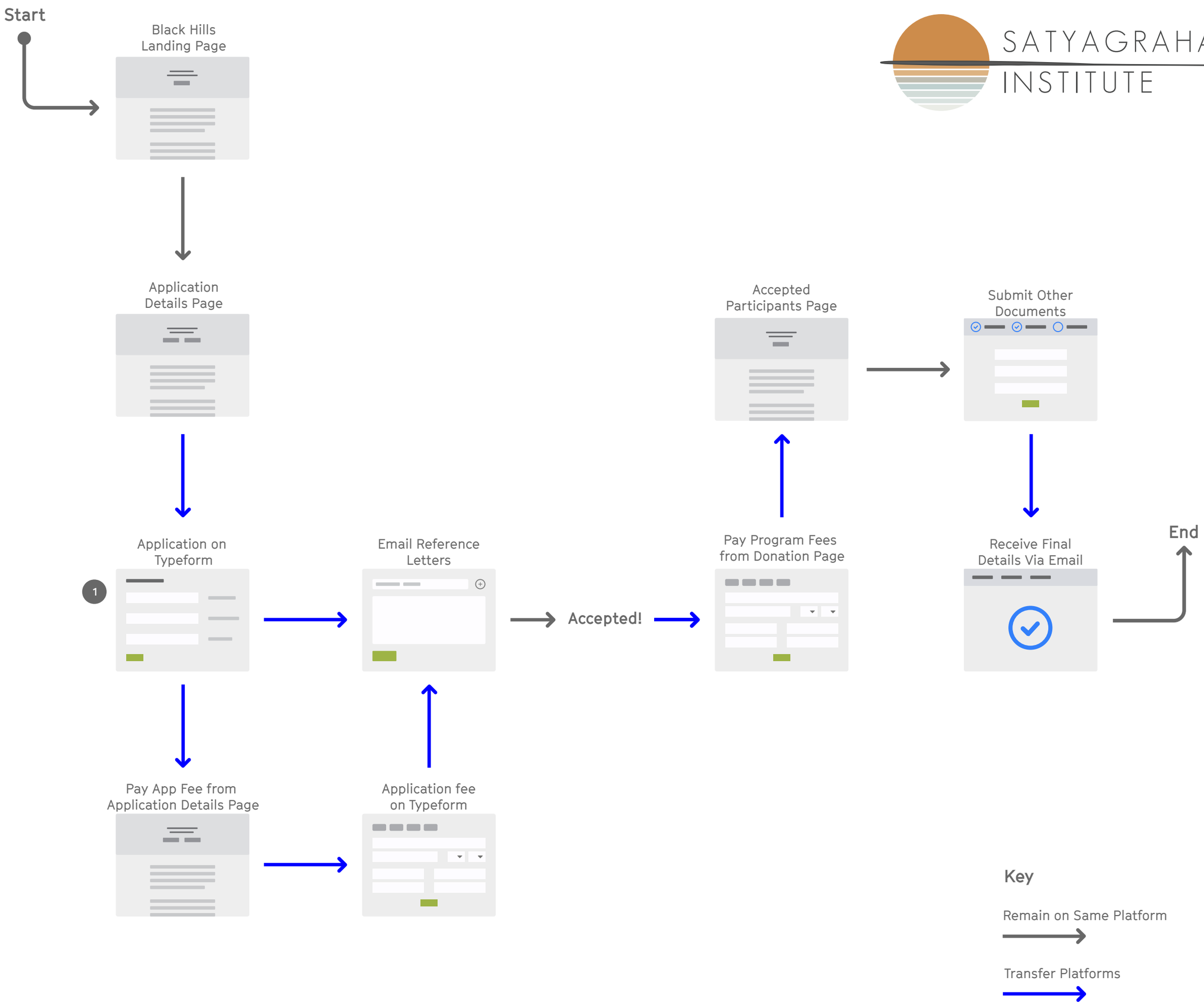
Devices

Apps



Product Analysis

This graph, based on Gartner's Magic Quadrant, illustrates how potentially analogous products fare with respect to completeness of vision and ability to execute. These characteristics are delineated with four quadrants: Challengers, Leaders, Niche and Visionaries.



Current Black Hills Application Workflow

1 Applicants have the option of paying the $20 application fee either at this point in the process or at a later date.

This workflow illustrates the arduous journey, involving disparate platforms applicants must take to complete the application process. Ideally, all tasks would be perfomed within the same platform.

Design Principles

Transparent

Applicants should never feel as though they are ignored during the decision making process. Keep them in the loop whenever possible. Likewise, coordinators should be aware of an applicant's completion status at all times. The entire application process should resemble an open dialogue between two individuals.

Communicatory

The system should consistently facilitate clear, concise written communication between applicants and coordinators to both reduce communication induced errors and uphold Satyagraha Institute's culture of 'uno a uno'.

Universal

Users should feel as though they are using a system based in their own country. As Satyagraha Institute expands its network across many nations and communities, maintaining geographic and cultural agnosticism within its primary touchpoint will be imperative for developing both meaningful relationships with applicants and communicational efficiency.

Concentrated

Users should only receive *critical* notifications outside the system to retain focus and urgency. Display one piece of information at a time to promote clarity across the system.

Problem Statements

Satyagraha Institute coordinators need applicant materials to be aggregated because they are currently easy to lose track of or misplace.

Satyagraha Institute applicants need task continuity and more transparency because they feel the current process is too fragmented.

Coordinators

View payment status (application fee and deposit and program fee if accepted)

View and track documents for accepted applicants

Reject applicants

Accept applicants

Communicate with applicant within system

View and sort list of applicants (all accepted, rejected, in progress, decision pending

View applicant profile (contains application)

View travel mode for accepted participants (if by air, view flight status)

Read reference letters

Contact references

Send specific applicants, or en masse updates

Login

For accepted participants: show payment status on card

Refund payment

Applicants

Register for account

Apply

Save application for later

Pay application fee

Solicit reference letters

Pay deposit

Pay program fee

Submit documents (Headshot, Participant Agreement, Emergency Contact Form)

View application status

Edit profile information (same as application?)

Submit travel information

Communicate with coordinators

Withdraw application

Select which programs to apply for

(Checklist concept?)

Landing page - Applicant

Logo

Satyagraha Institute
Application

Begin >

English, Español, Français

Account creation - Applicant

Logo

Account Creation

1 step1 step2 step3

Email Address

2 Password

Next >

cancel

1 visually emphasize active state 2 Add pass requirement copy/ability to view pass.

Basic Information - Applicant

2A

Logo

Basic Information

Step1 — Step2 — Step3

(6)

First Name

Last Name

Preferred Name

Address

City State

Zip Country

Home Phone #

Mobile #

DOB Gender

Citizenship

Race / Ethnicity

Languages

(3) Next >

(2) Include back button (1) Include headshot upload here → required

Application - AppWeant

Logo

Application

Skip

Step1 — Step2 — Step3

You can save this section for later.

(5)

(4)

make required

(4) Save + Continue Button and Back button (5) select which program to apply to

Final onboarding Screen - Applicant

3A

Logo

Hello, {First Name}

(7)

(8) Finish

(8) consider different copy

(7) Copy about next steps and whether or not they need to finish application

"Dashboard" - Applicant - In Progress

(12) When all complete, add 'Submit for review' button with modal to confirm submission - no going back

Logo

Notif Inbox (8) (10)

Good evening, {First Name}

(11) Status: In Progress
Your application is incomplete and has not been submitted for review.

Application Materials (12)

Incomplete Profile

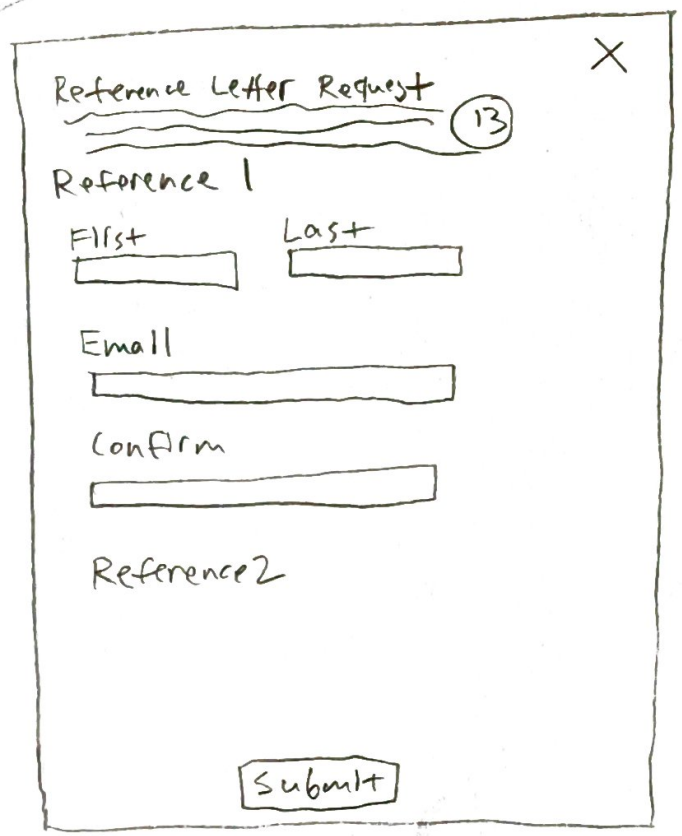
Complete Application Fee

Submit References

(9)

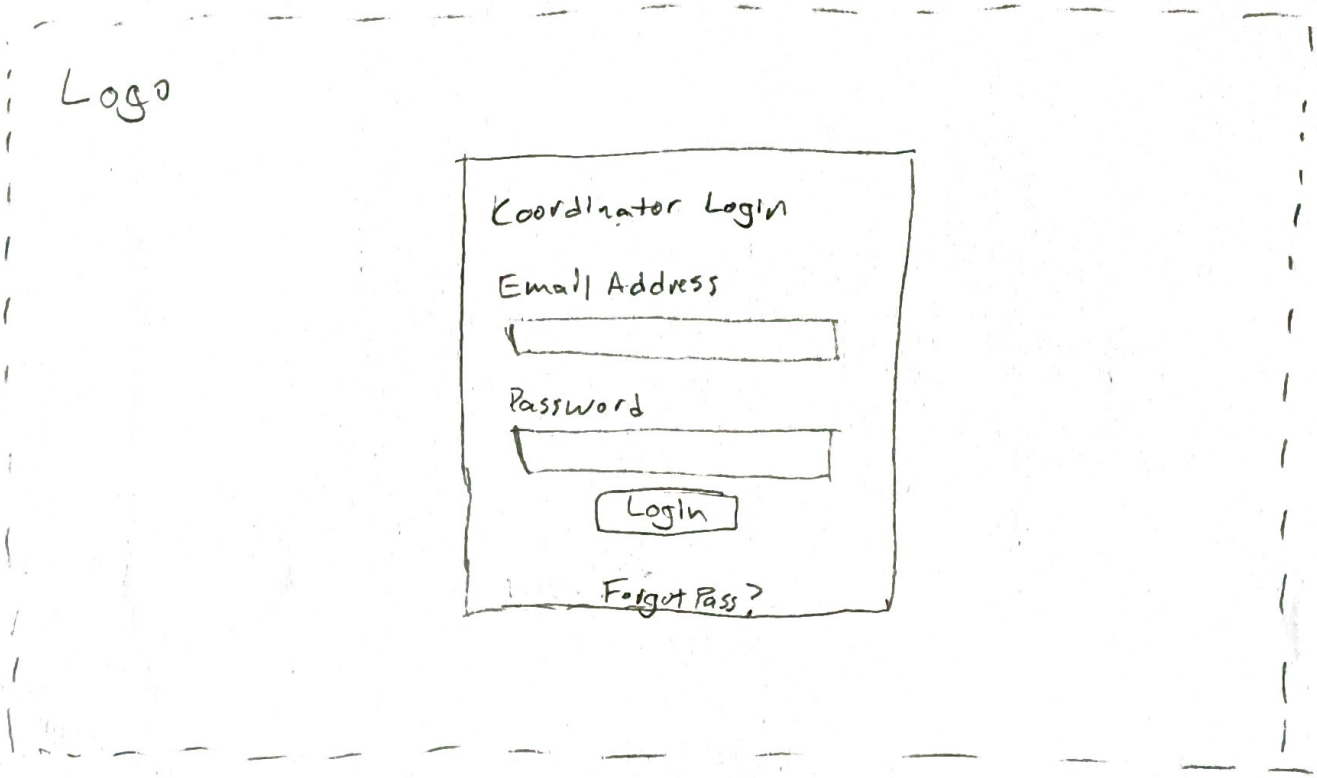
(9) Highlight unfinished steps with red (10) consider changing to 'Notifs' but 'Inf' not 'Info' (11) consider adding 'Info' but 'Inf' not 'Info' - 'In Progress' text next to 'Inf'

Reference Letter Request - Applicant

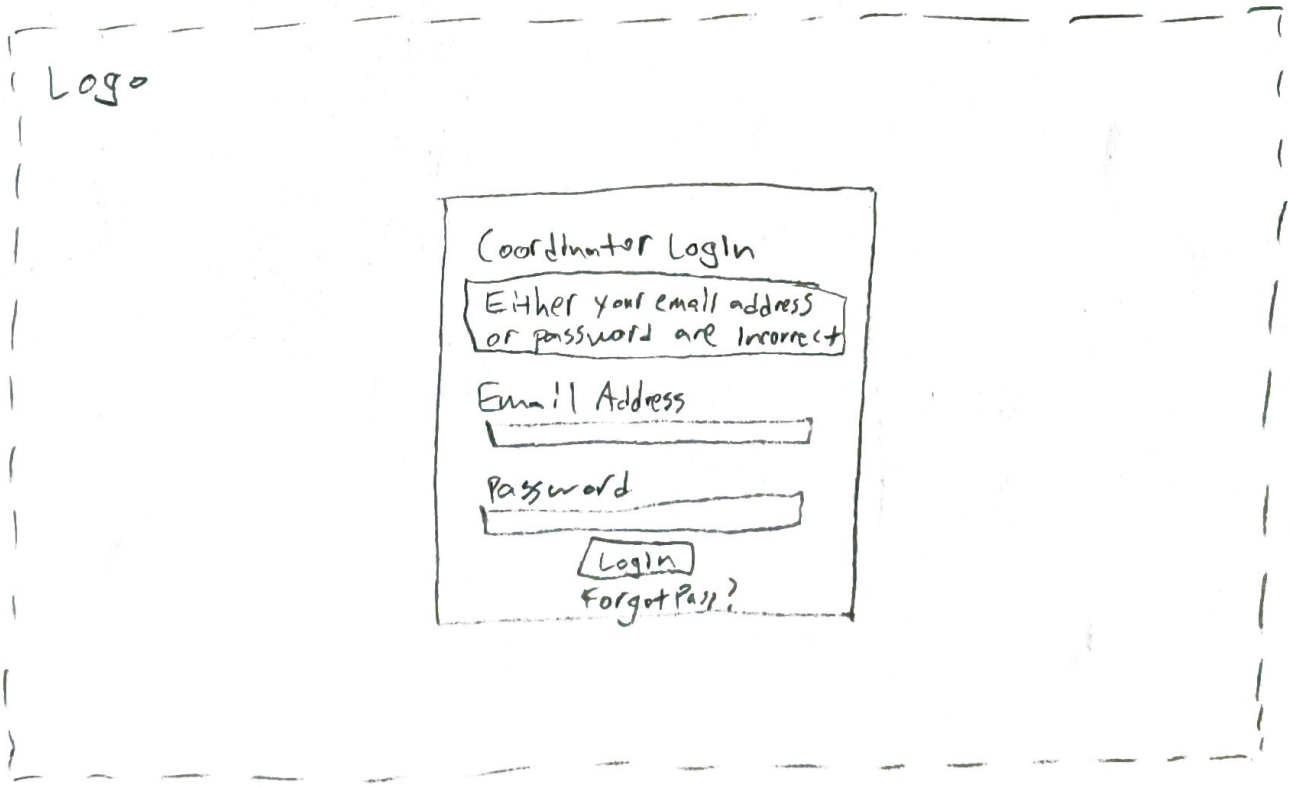


13 Explain how reference letter process works

Login 1 - Landing Page



Login 1.2 - Error State



Login 2 - Success → Dashboard

Logo

Notif Inbox (2)

Good afternoon, Kate.

All | In Progress | Decision Pending | Accepted | Rejected

Total: 4 (10)

(5)

(5) Add ability to filter applicant list (10) consider placing total next to each category

Accepted Applicant Profile - Coordinator View

(2)

Logo

Notif Inbox (2)

← Back

Status: Accepted

unaccept

John Smith

Payment refund

✓ Application Fee Exempt

✓ Deposit

Pending Program Fee

Documents

View Emergency

View Agreement

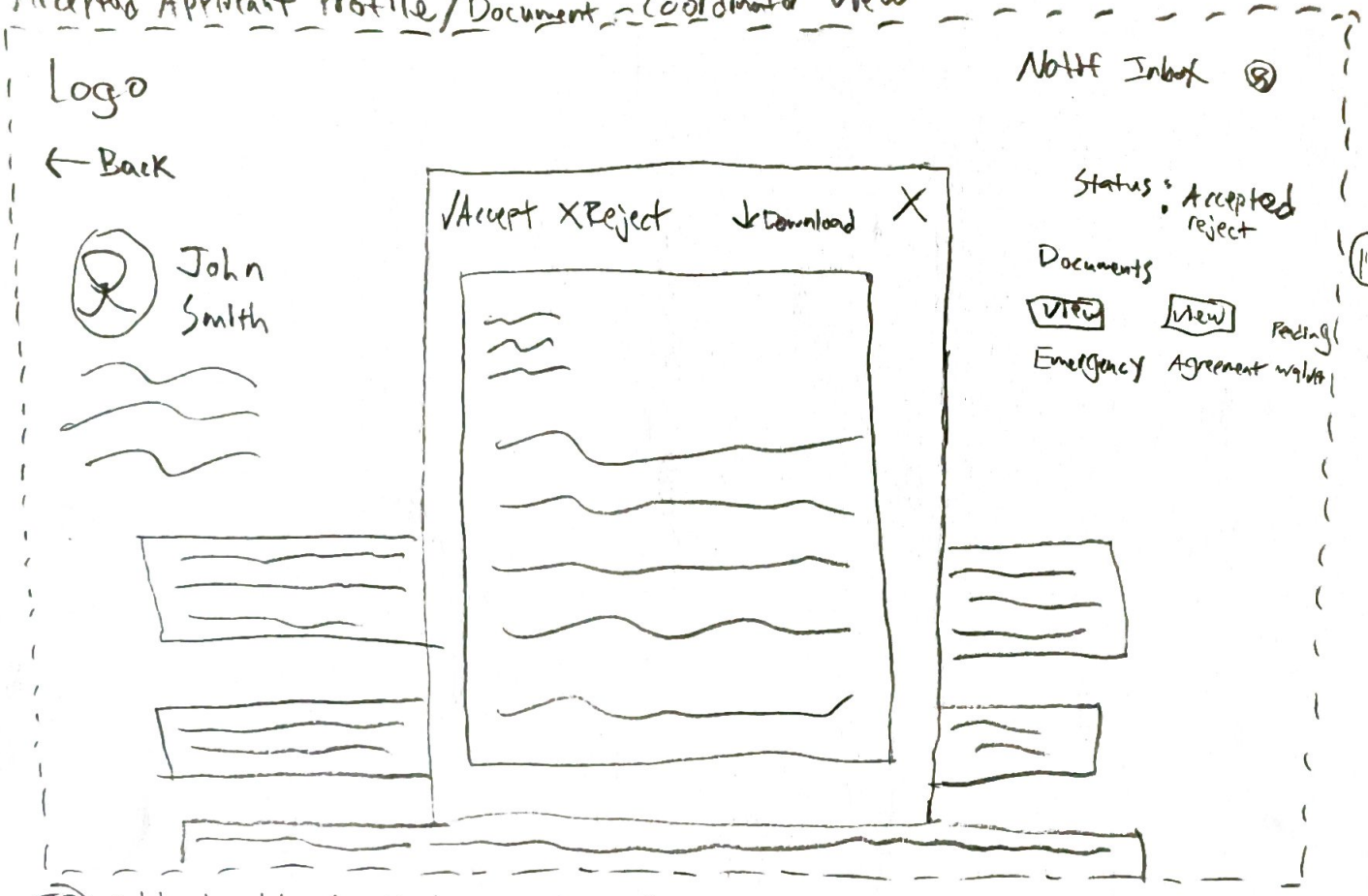
Pending Waiver

(1)

(6)

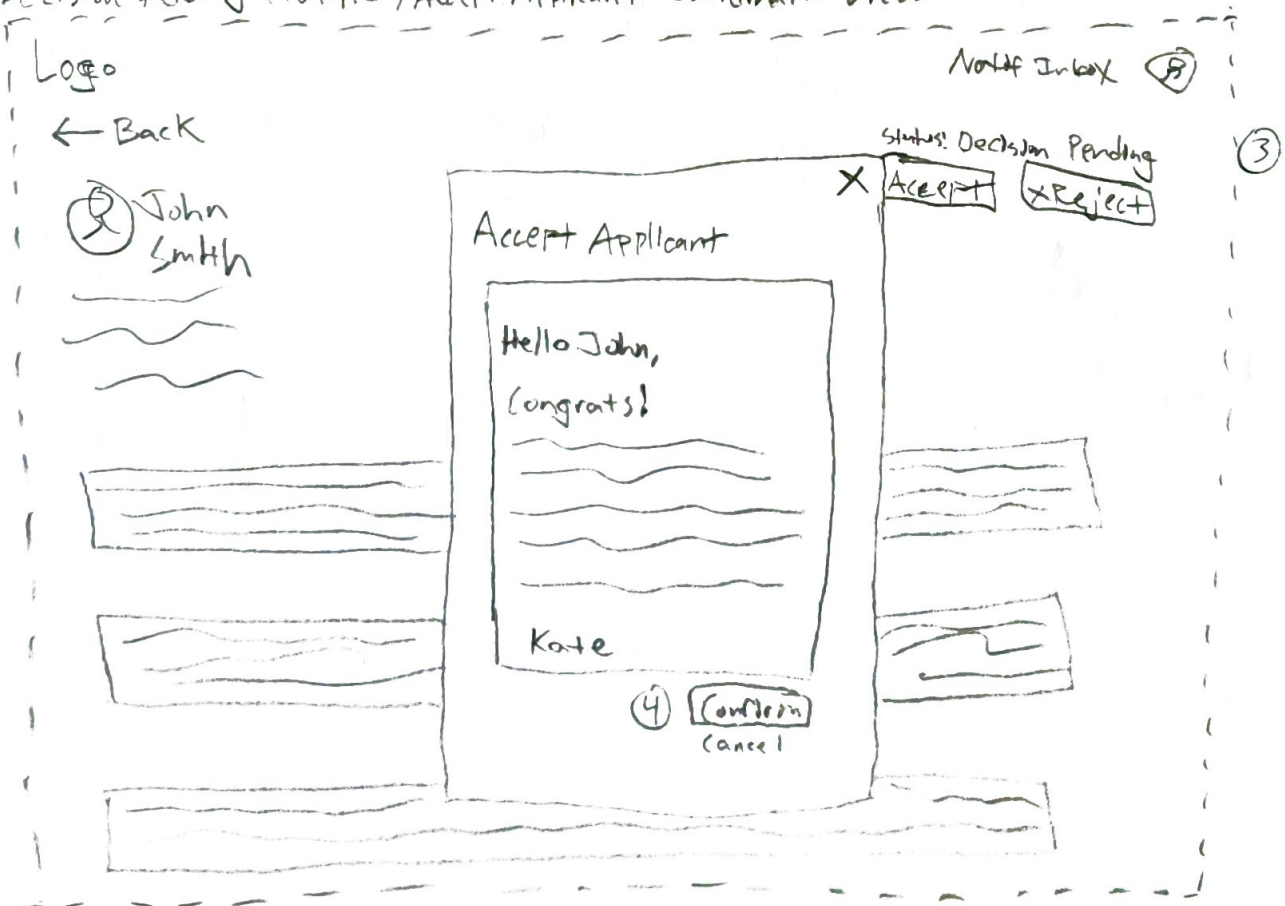
(1) Add reference letters (2) Fixed menu (6) Add send message

Accepted Applicant Profile/Document - Coordinator View



10 Add download all documents button

Decision Pending Profile/Accept Applicant - Coordinator View



3 Add mark as under Review button for pending applicants 4 Sends note to applicant email and inbox

Doc Pending Applicant / Reference Letters - Coordinator View

Logo

← Back

Notif Inbox (8)

John Smith

Reference Letter 1 ↓ Download

Reference Name:

Reference Email:

~~✓Accept~~ ~~✗Reject~~

Status: Decision Pending

✓Accept ✗Reject

Documents

Inbox - Coordinator

Logo

Inbox

~~Notif Inbox~~

Compose

(8)

Name → Status

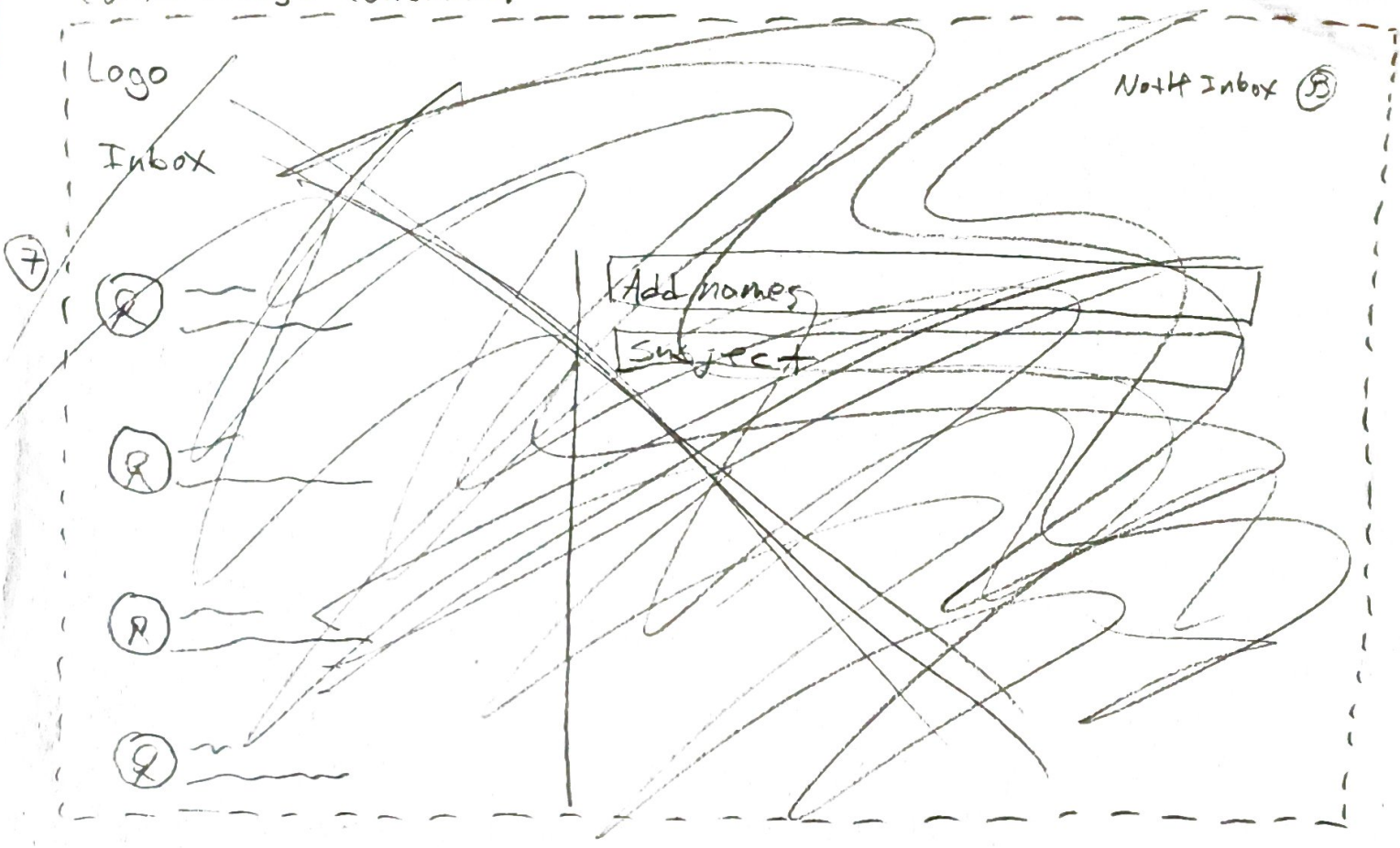
Message preview

Name → Status

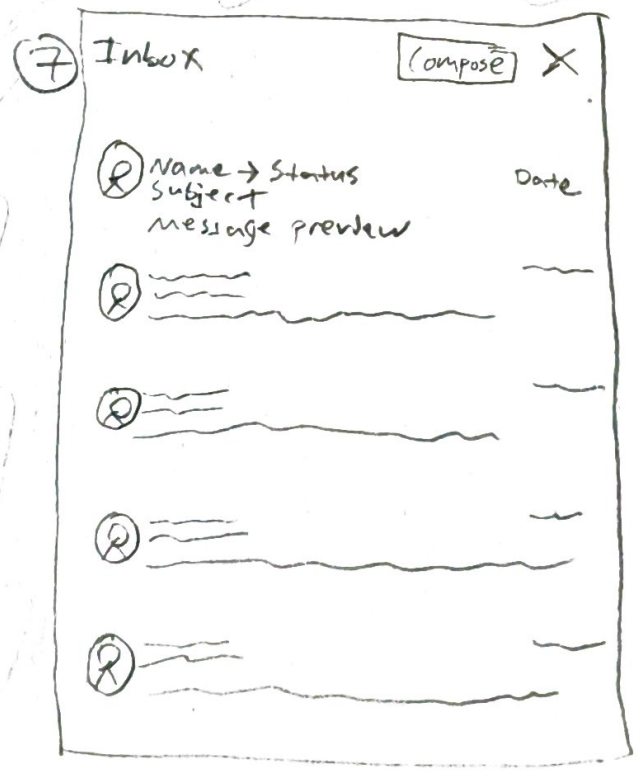
Type Message Here

(8) Add subject line

Compose message - coordinator



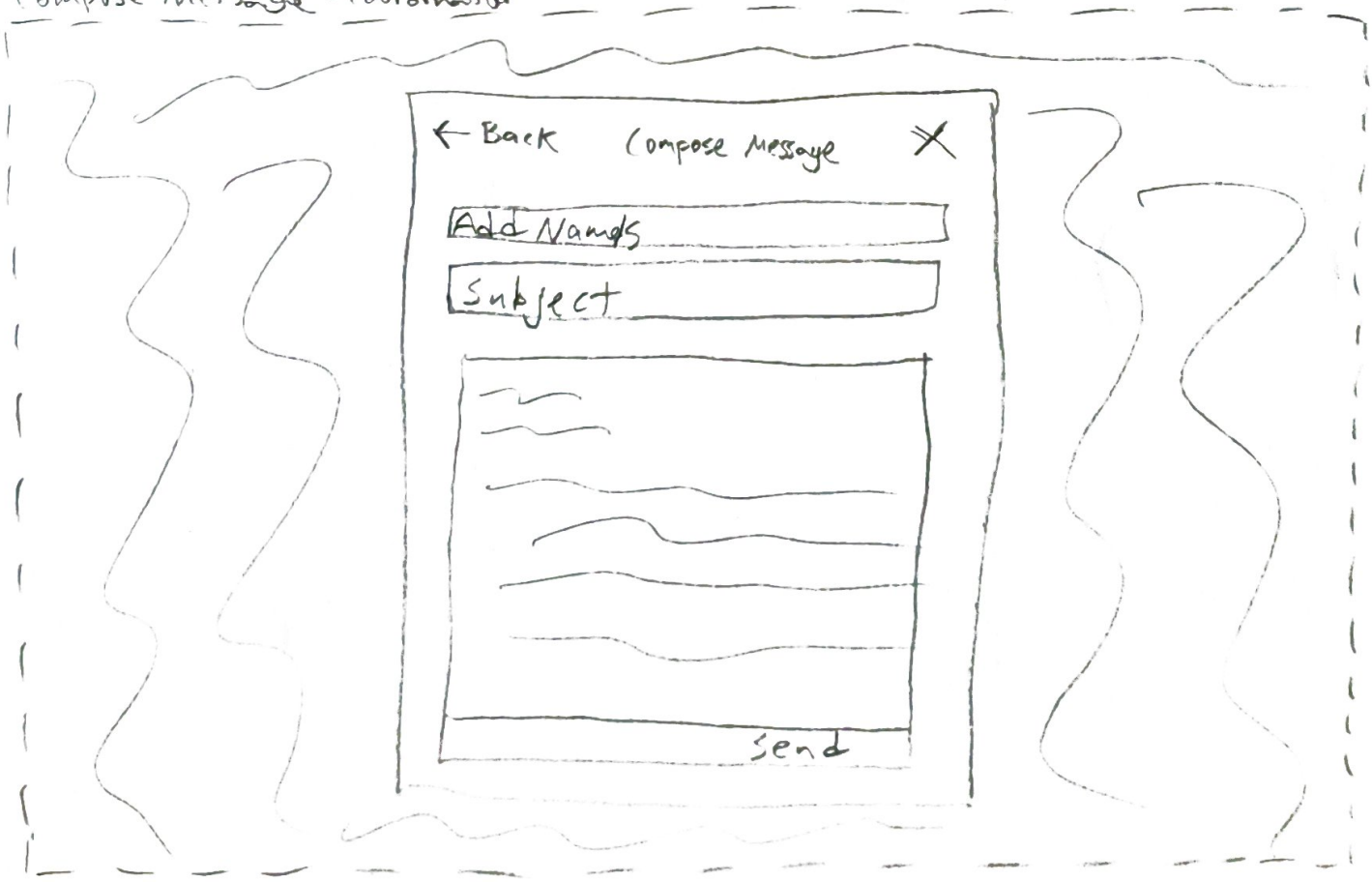
Inbox - coordinator



7 Model accessible from anywhere

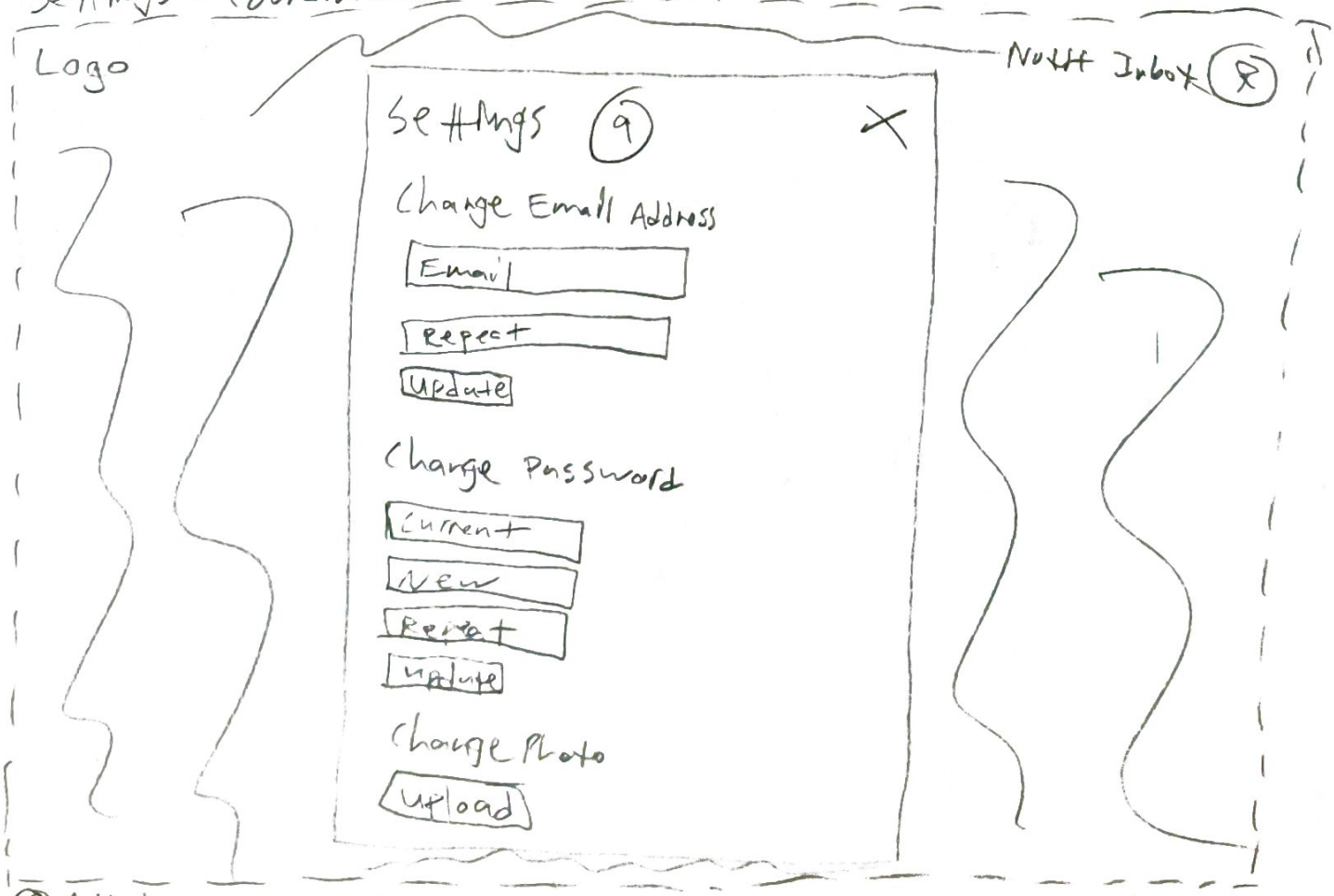
Message screen of Inbox - Coordinator

Compose Message - Coordinator



Notifications - Coordinator

Settings - Coordinator

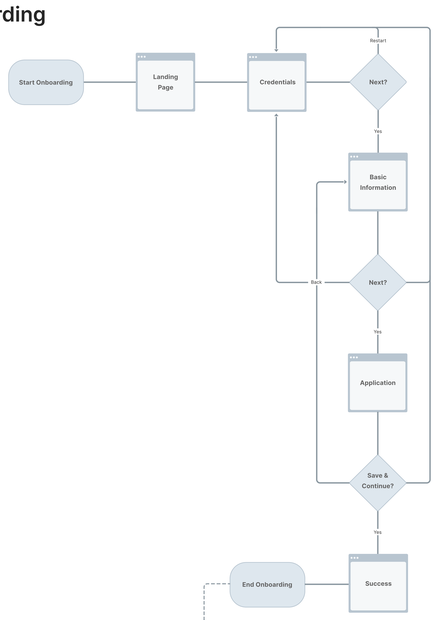


9 Add language preference - consider different content layout

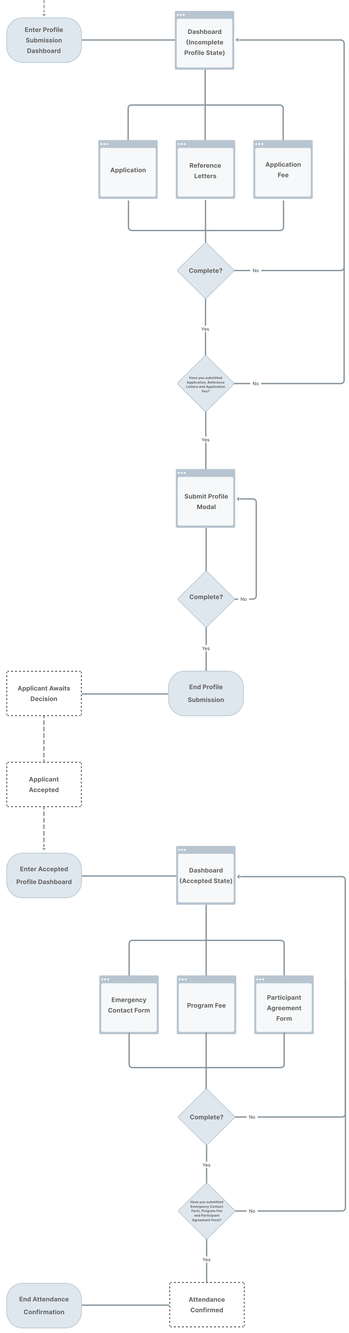
Key Applicant User Flows

The user flows depicted below assume the applicant didn't complete the application during while onboarding, they're accepted into the program and confirm attendance.

Oboarding



Finish and Submit Profile



Confirm Attendance

Applicant Wireframes and Mockups

Onboarding / Landing Page

SATYAGRAHA INSTITUTE

Questions?

Satyagraha Institute Application

You are about to start an application for a Stayagraha Institute program. Please make sure you meet all eligibility requirements before beginning.

Create Profile >

View Eligibility Requirements

English Español Français

SATYAGRAHA INSTITUTE

Questions?

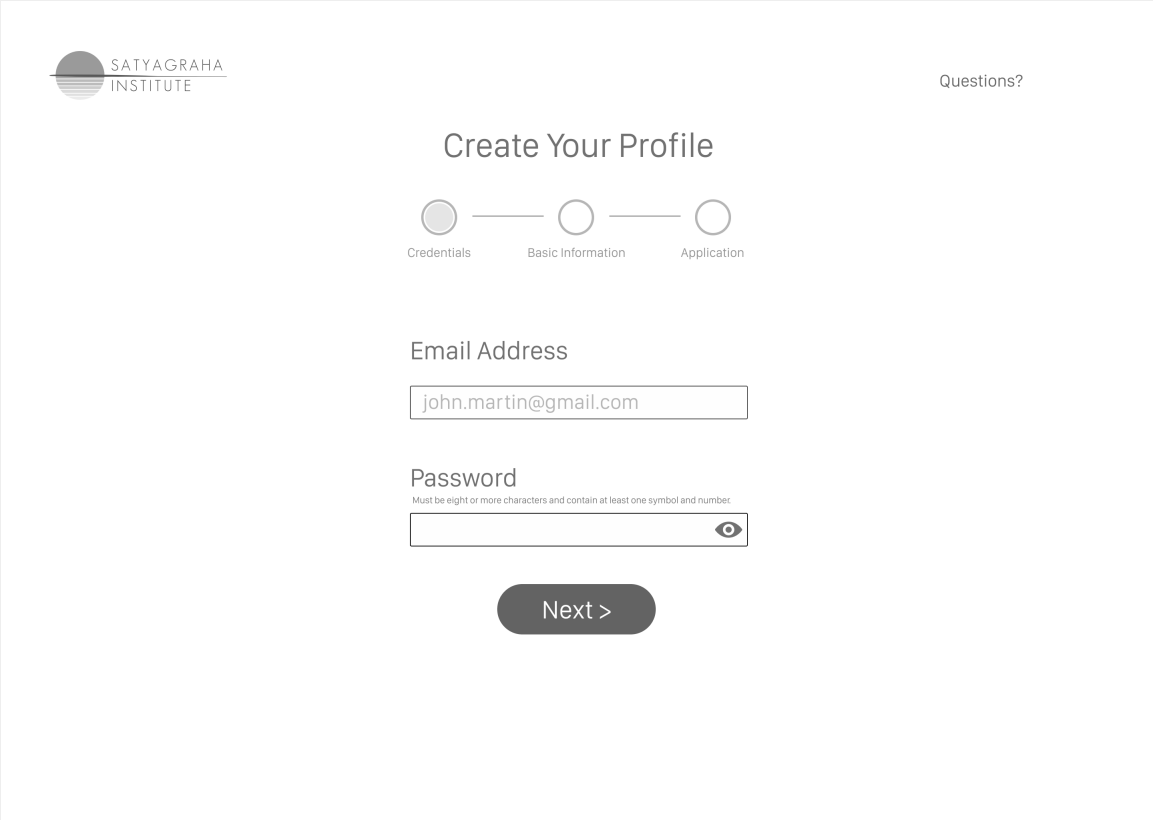
Satyagraha Institute Application

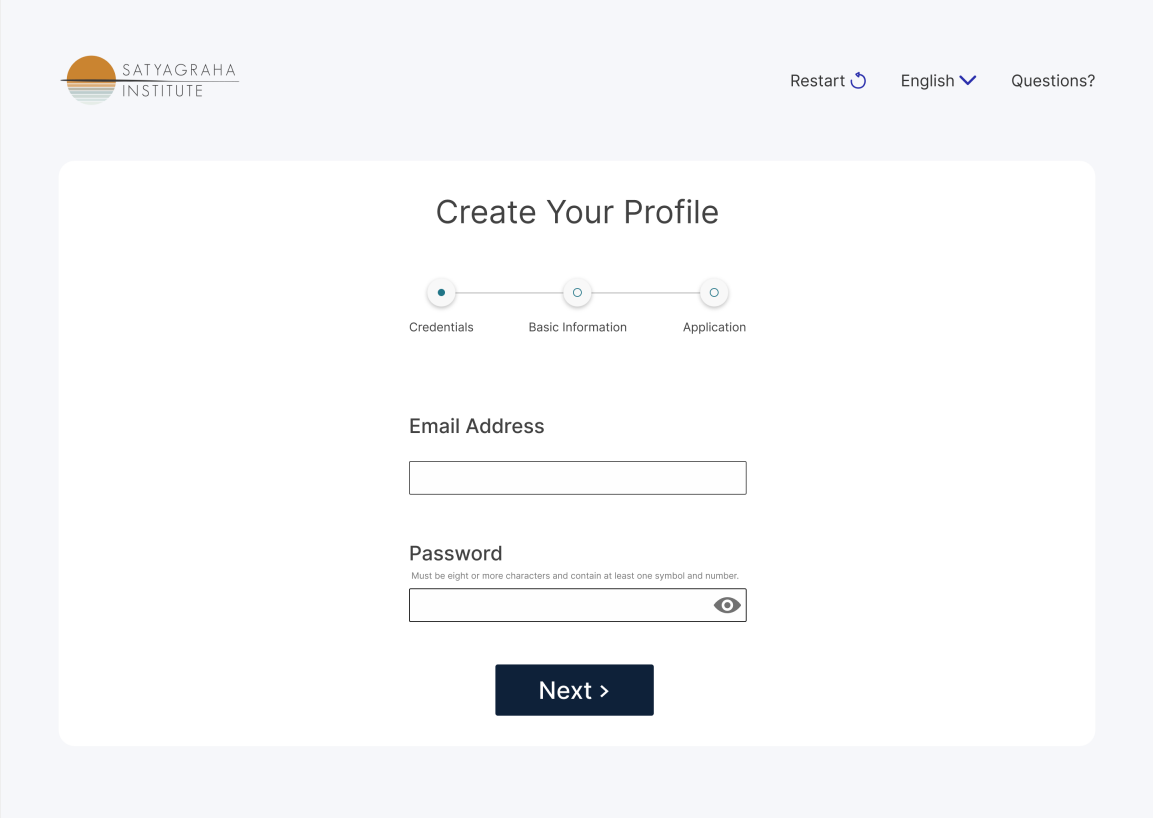
You are about to start an application for a Stayagraha Institute program. Please make sure you meet all eligibility requirements before beginning.

Create Profile

English Español Français

Onboarding / Login Credentials





Onboarding / Basic Information Form [1/2]

SATYAGRAHA INSTITUTE

Questions?

Create Your Profile

Credentials — Basic Information — Application

Upload Headshot

Drag and drop photo here
or
Browse Files

Program

For which program would you like to be considered?

Name

First name

Last name

Preferred name

Contact

Address

City

State

Postal code

Country

Phone number

Type

Demographics

Date of birth

Gender

Country of citizenship

Race/Ethnicity

Two of your most fluent languages

Next >

Back Scroll to top

Onboarding / Basic Information Form [2/2]

SATYAGRAHA INSTITUTE

Restart English Questions?

Create Your Profile

Credentials — Basic Information — Application

Upload Headshot

Drag and drop photo here
or
Browse Files

Select Program

For which program would you like to be considered?

Name

First name

Last name

Preferred name

Contact

Address

City

State

Postal code

Country

Phone number

Type

Demographics

Date of birth

Gender

Country of citizenship

Race/Ethnicity

Two of your most fluent languages

Next ›

← Back Scroll to top

Onboarding Success

SATYAGRAHA INSTITUTE

Hello, Alex.

Your account has been created, but your application is unfinished. Please complete it before the XX {Month} deadline.

View Your Profile >

Back to application

SATYAGRAHA INSTITUTE

English Questions?

Hello, Alex!

Your account has been created, but your application is unfinished.

Please complete it before the July 1st deadline.

View Your Profile >

Profile States / In Progress Application [1/2]

SATYAGRAHA INSTITUTE

Notifications (2) Messages (1) Alex

Profile Status: In Progress

Withdraw Application

Alex Warren

Message Coordinator

Personal Information

Application Status

- Essays >
- Community life >
- Health >
- Signature >

Reference Letters >

- Letter 1
- Letter 2

Application Fee >

- Paid

Incomplete

Essays

Briefly describe your current work/employment.

Enter your response here.

List any previous work/employment that you consider noteworthy.

Enter your response here.

Are you currently involved in any work for social change that you did not mention above? If yes, briefly describe.

Enter your response here.

Briefly describe your educational background, including any degrees received.

Profile States / In Progress Application [2/2]

SATYAGRAHA INSTITUTE

Notifications 2 Messages 1 Alex

In Progress

Withdraw Application

Alex Warren

Message Coordinator

Basic Information

Application >

- Essays >
- Community life >
- Health >
- Signature >

Reference Letters >

- Letter 1
- Letter 2

Application Fee >

- Paid

Incomplete

Essays

Briefly describe your current work/employment.

Enter your response here.

List any previous work/employment that you consider noteworthy.

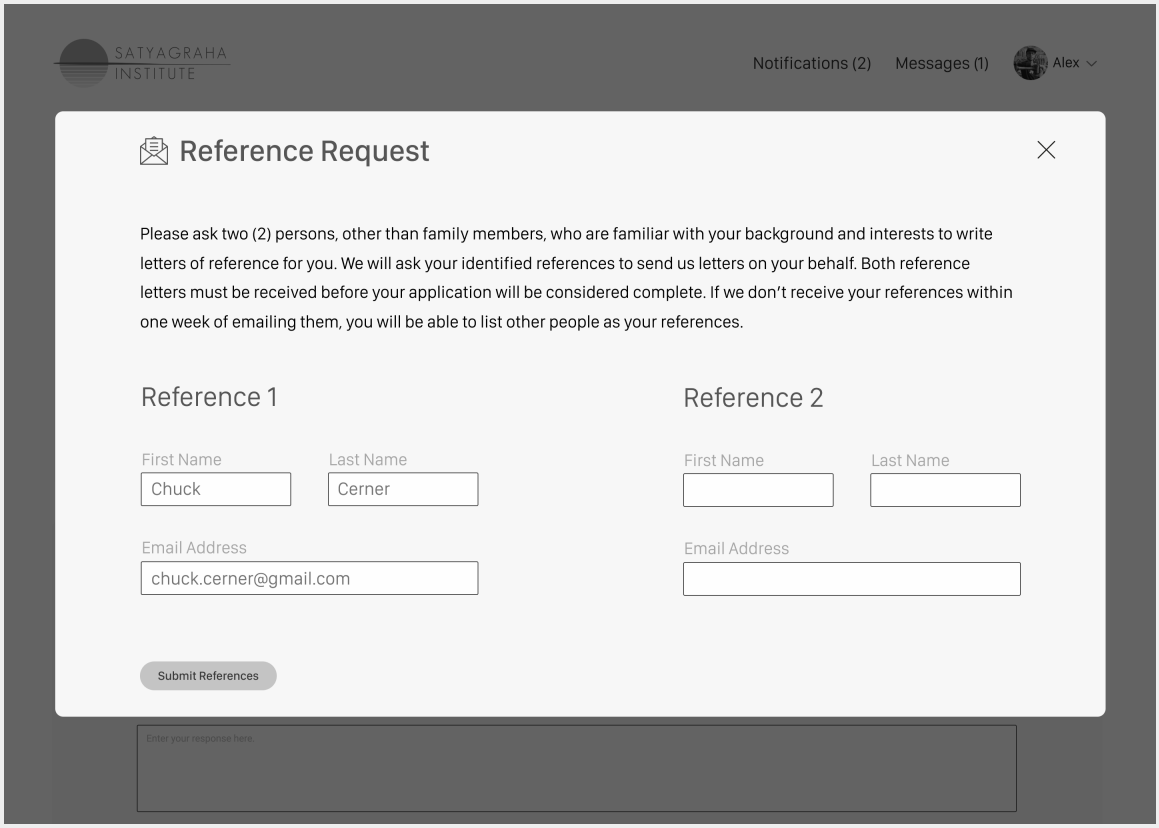
Enter your response here.

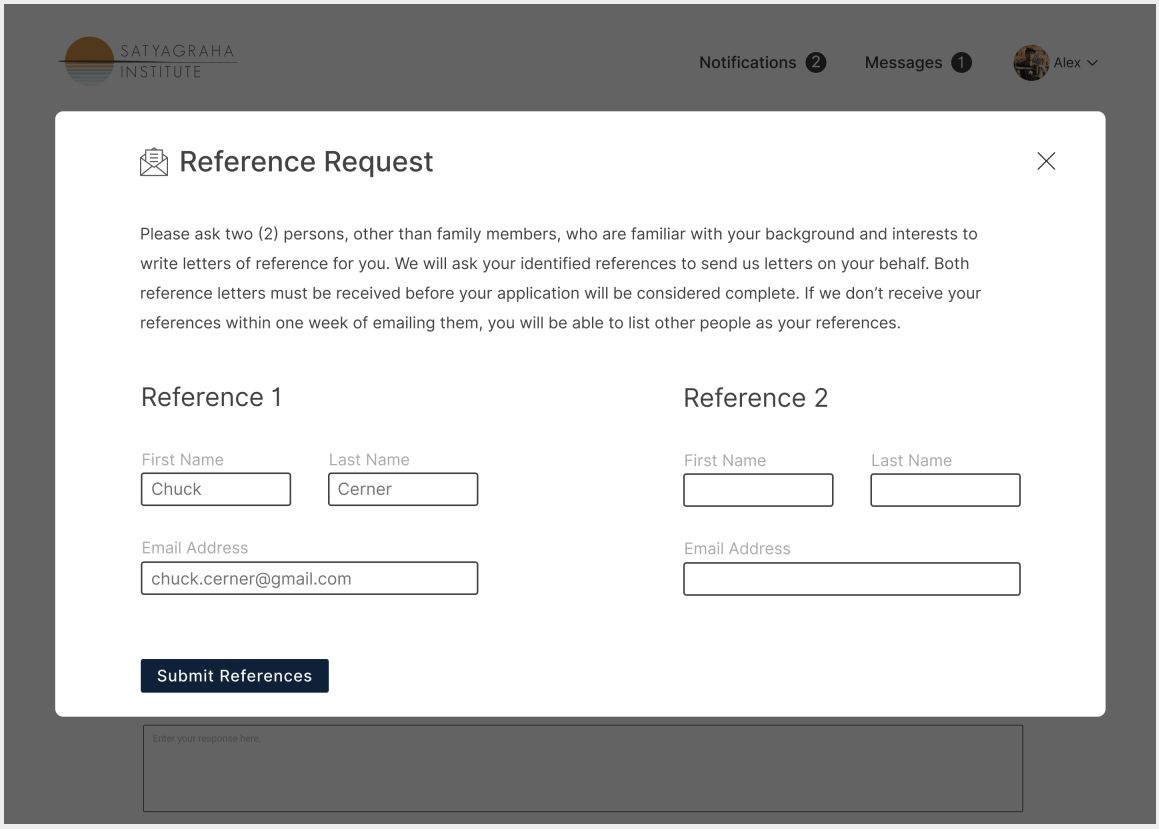
Are you currently involved in any work for social change that you did not mention above? If yes, briefly describe.

Enter your response here.

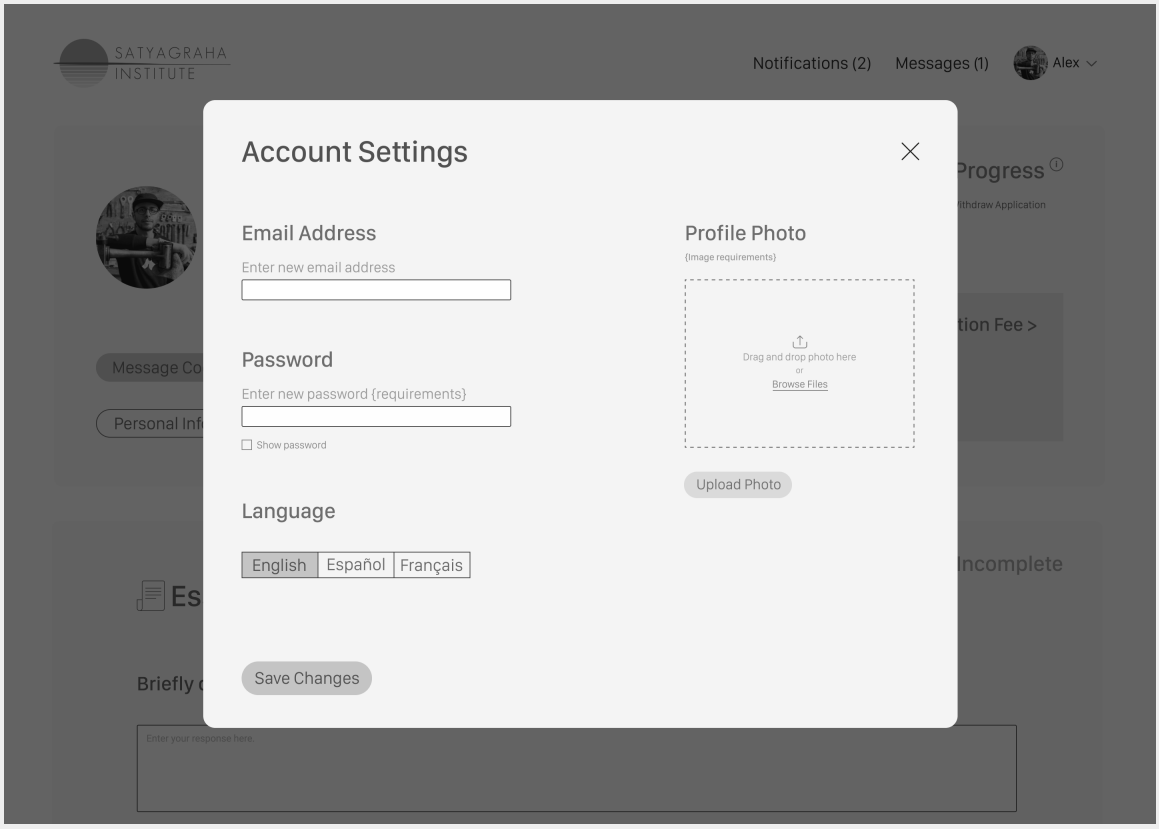
Briefly describe your educational background, including any degrees received.

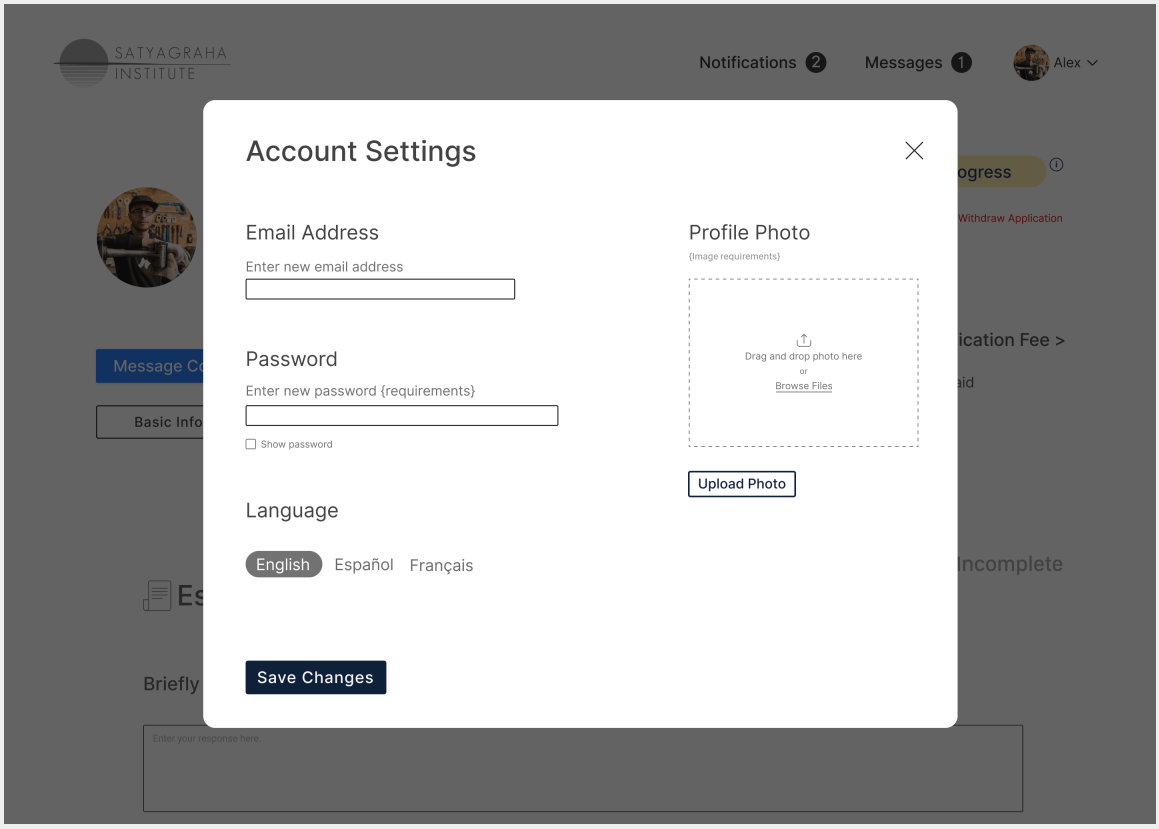
Profile States / Reference Letter Request



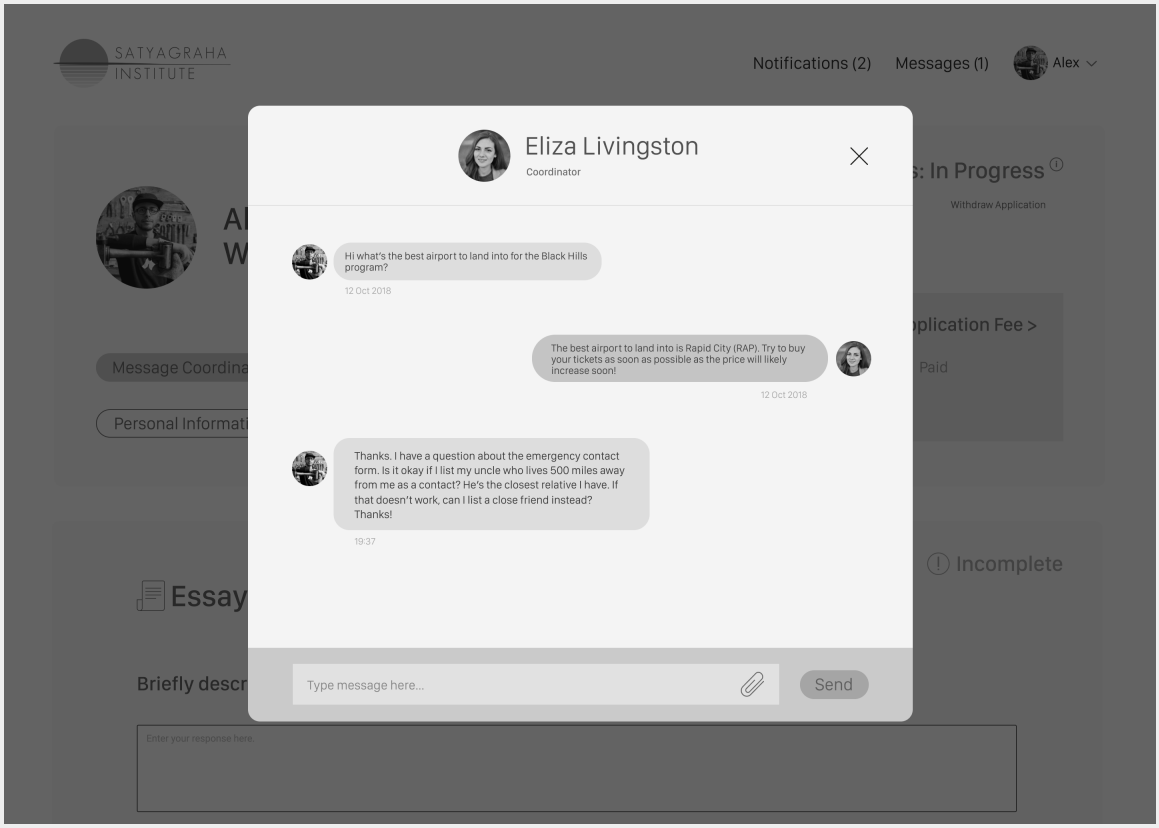


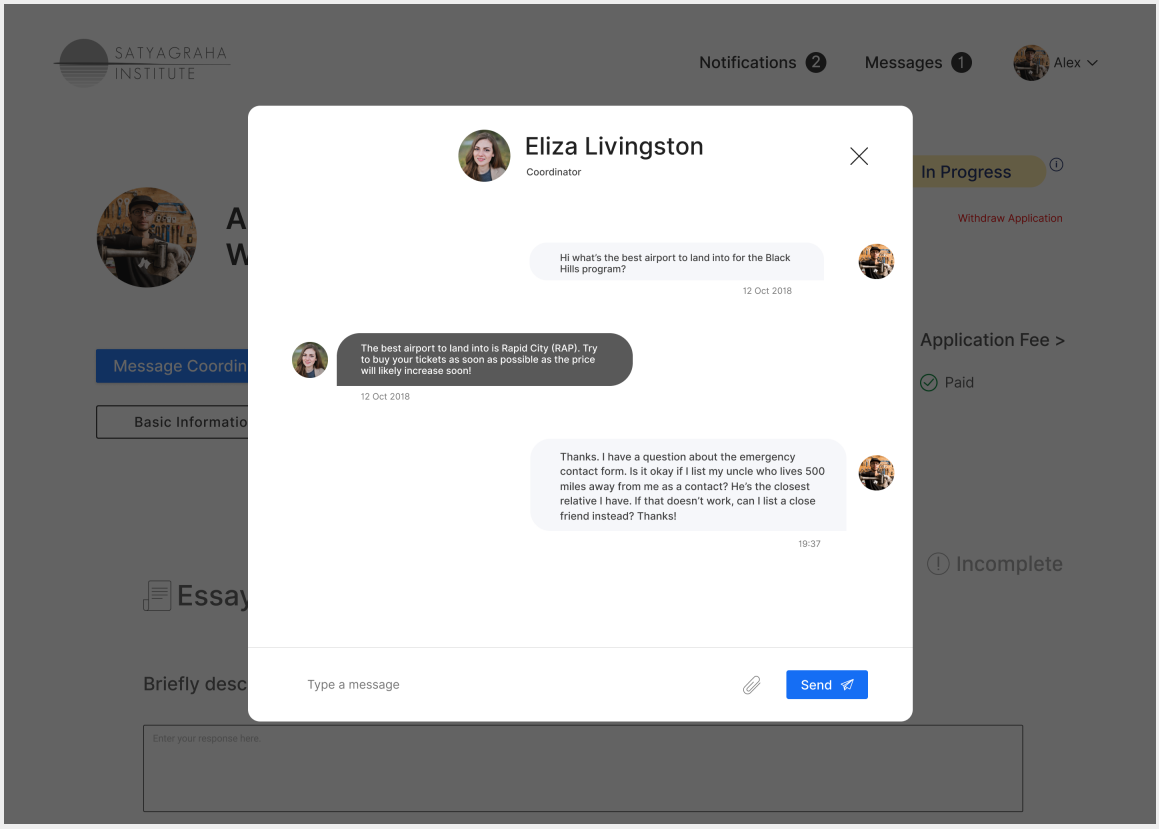
Profile States / Account Settings





Profile States / Messages





Profile States / Rejected Profile

SATYAGRAHA INSTITUTE

Notifications (2) Messages (1) Alex

Dear Alex,

Thanks for your interest in Satyagraha Institute. After careful consideration, we have determined you are not the best fit for our program.

Please consider applying again in the future.

Best of luck in your struggle against violence.

Thanks,
Eliza Livingston
Coordinator, Black Hills

Apply For Another Program

SATYAGRAHA INSTITUTE

Notifications 2 Messages 1 Alex

Dear Alex,

Thanks for your interest in Satyagraha Institute. After careful consideration, we have determined you are not the best fit for our program.

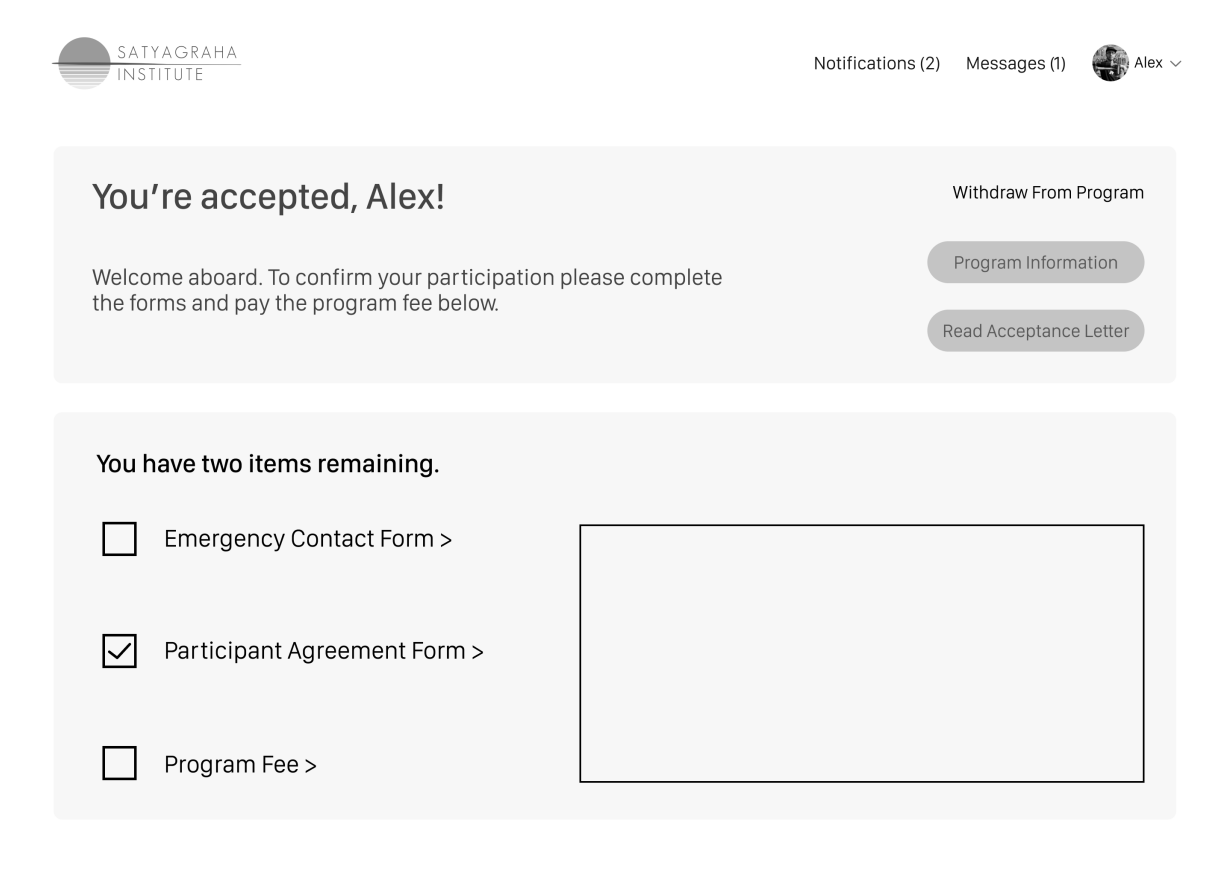
Please consider applying again in the future.

Best of luck in your struggle against violence.

Thanks,
Eliza Livingston
Coordinator, Black Hills

Apply For Another Program

Profile States / Accepted Profile [1/2]



Profile States / Accepted Profile [2/2]

SATYAGRAHA INSTITUTE

Notifications 2 Messages 1 Alex

You're accepted, Alex!

I'm not attending

Welcome to the community. To confirm your participation please complete the forms and pay the program fee below.

Program Information

Read Acceptance Letter

You have 2 items remaining.

Emergency Contact Form | Program Fee | Participant Agreement Form

Primary Emergency Contact

Full Name

Relationship to you

Mobile number

Work number

Email address

Address

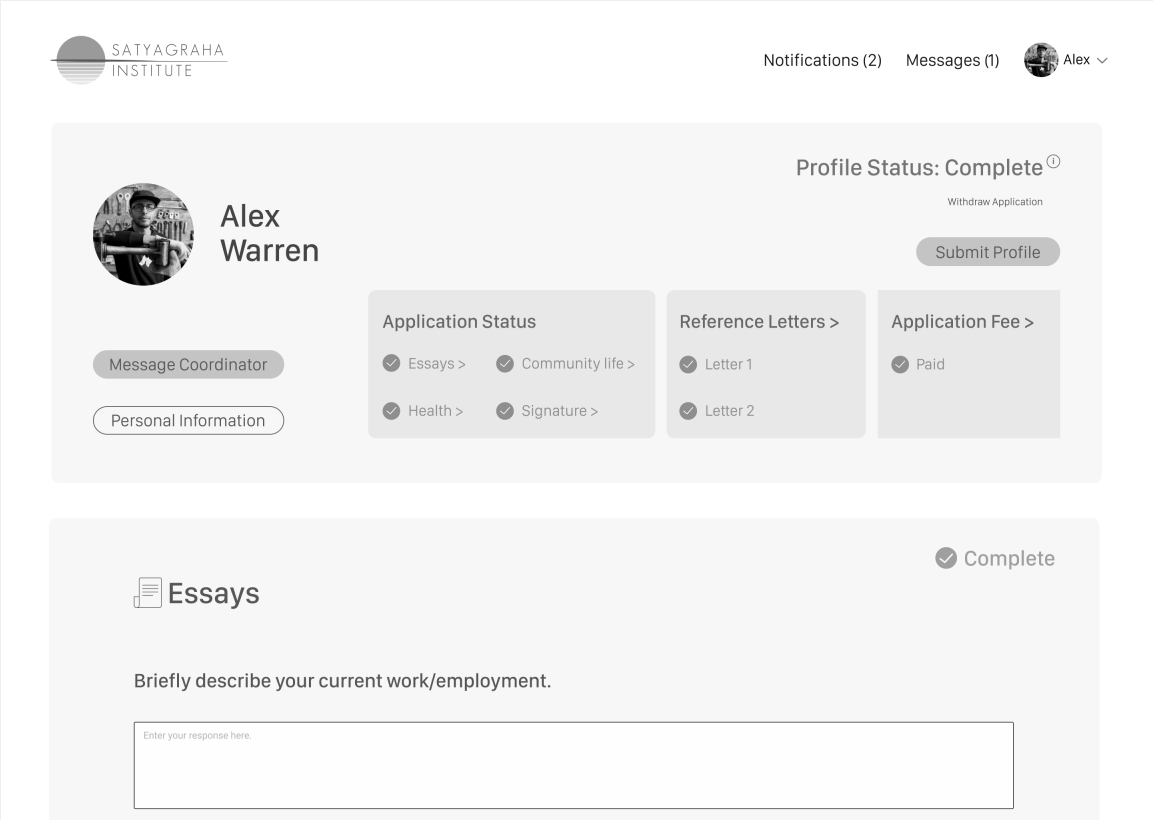
City

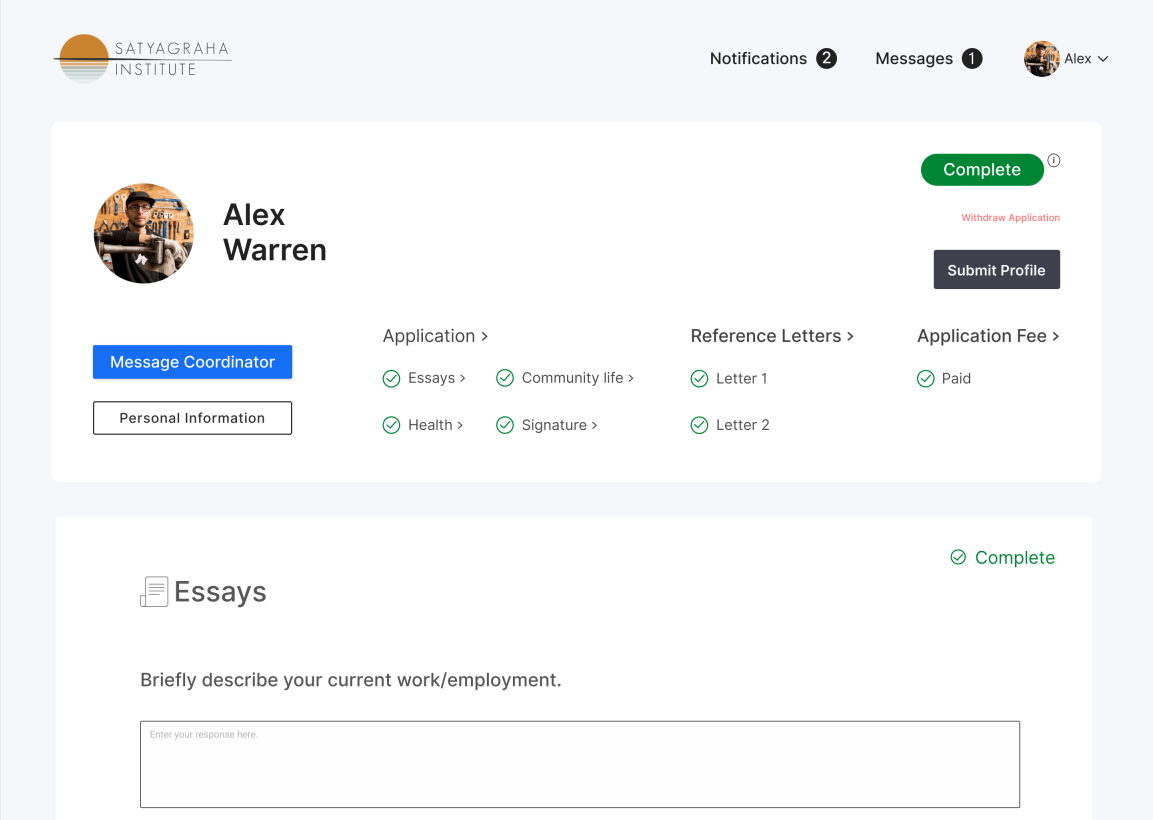
State

Zip code

Country

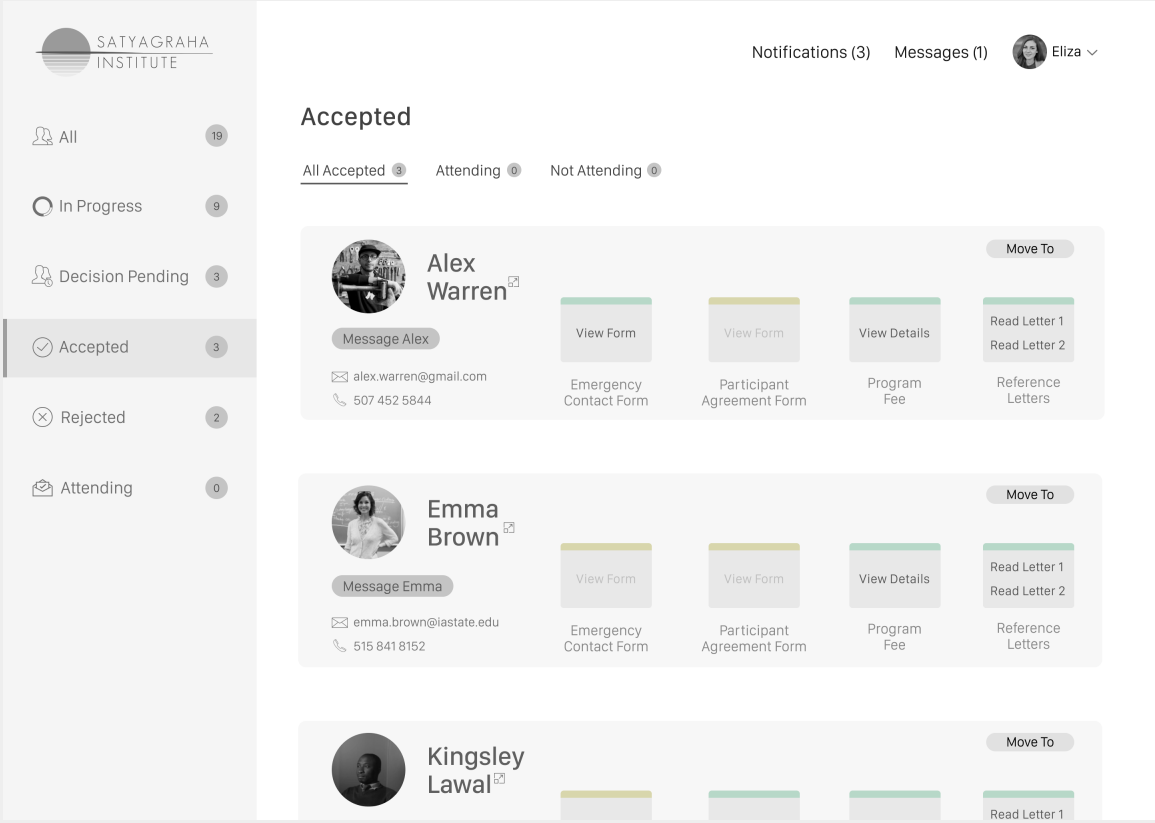
Profile States / Complete Profile

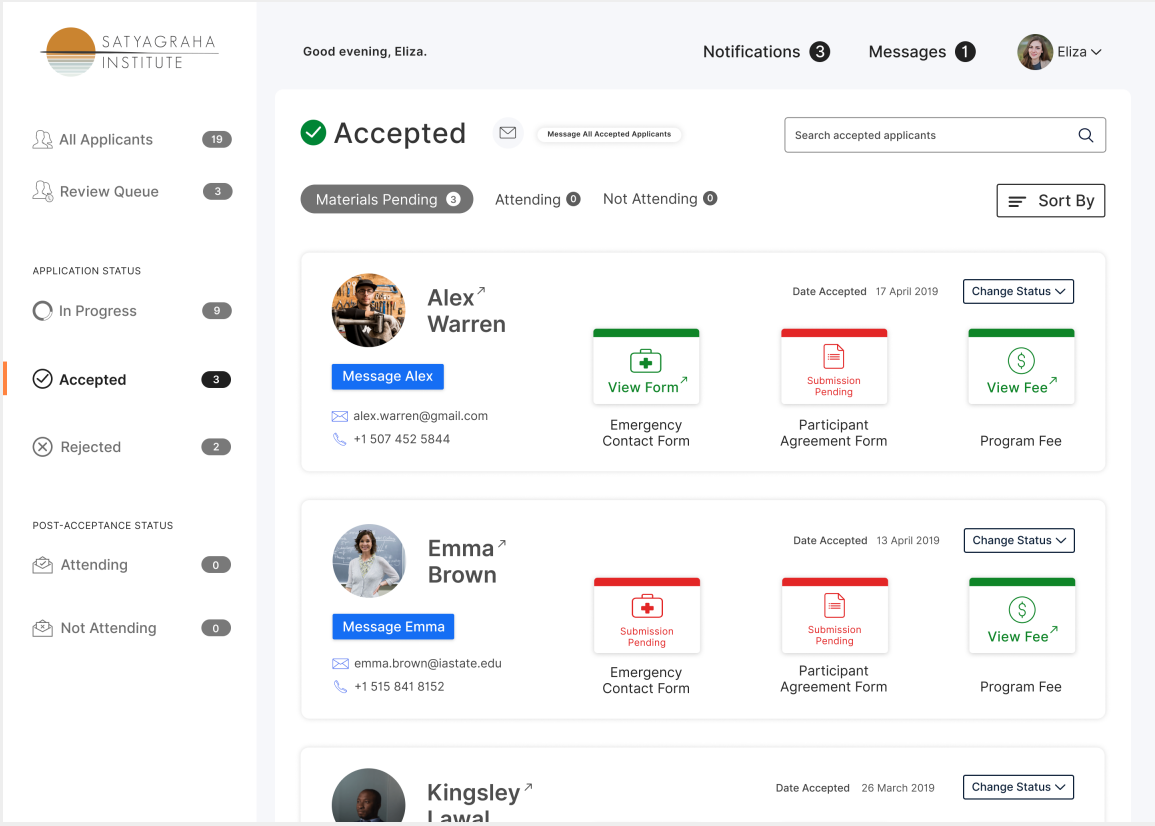




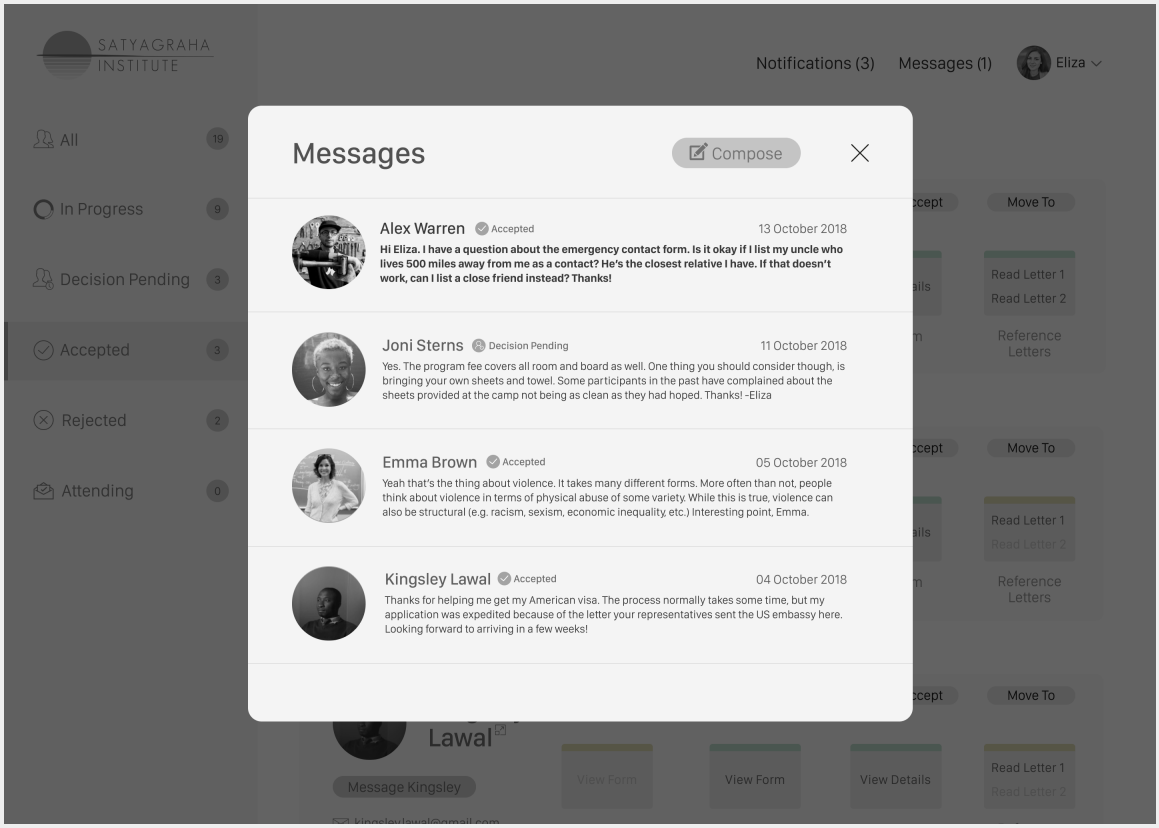
Coordinator Wireframes and Mockups

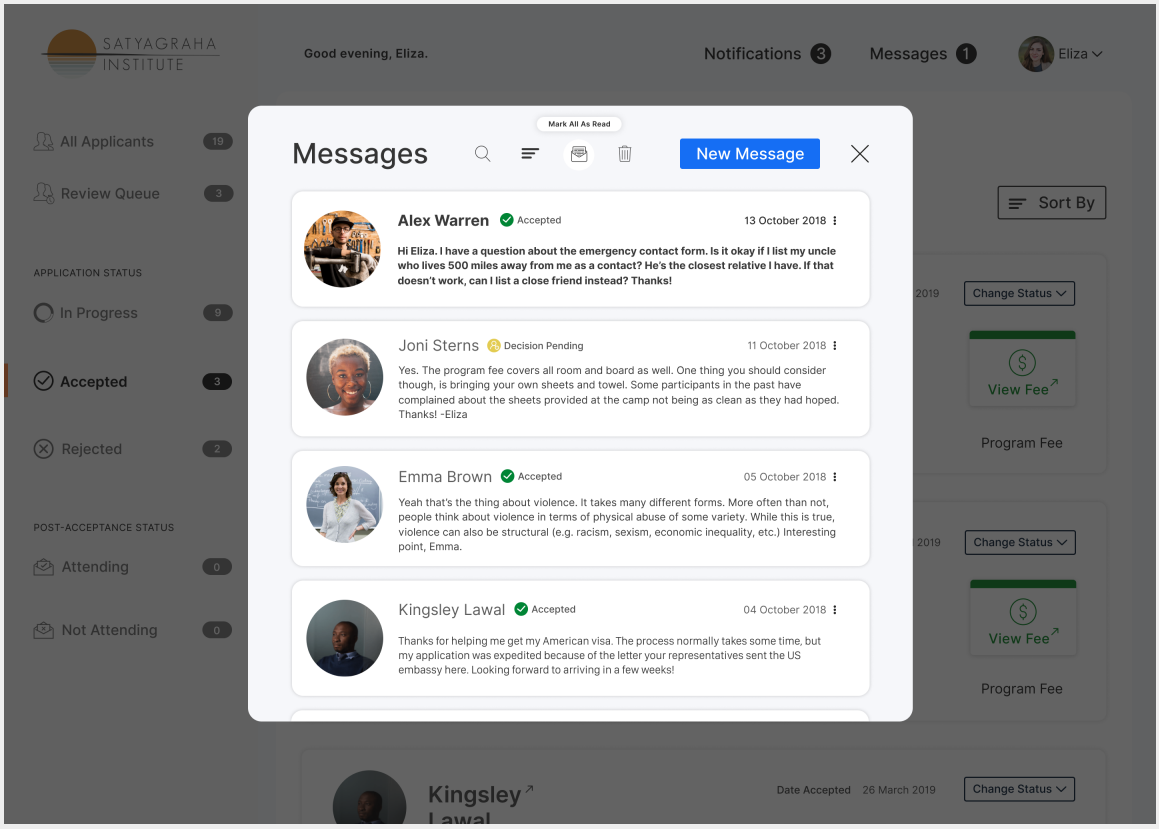
Dashboard / Accepted Applicants



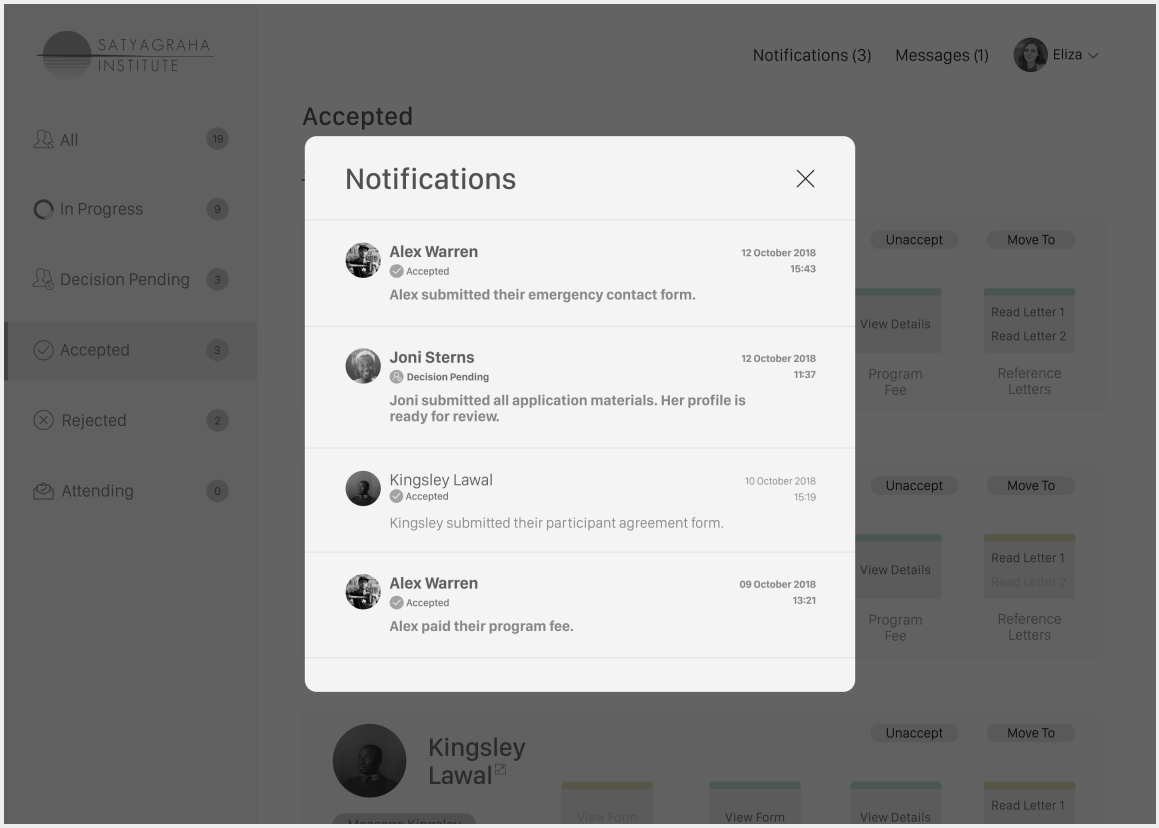


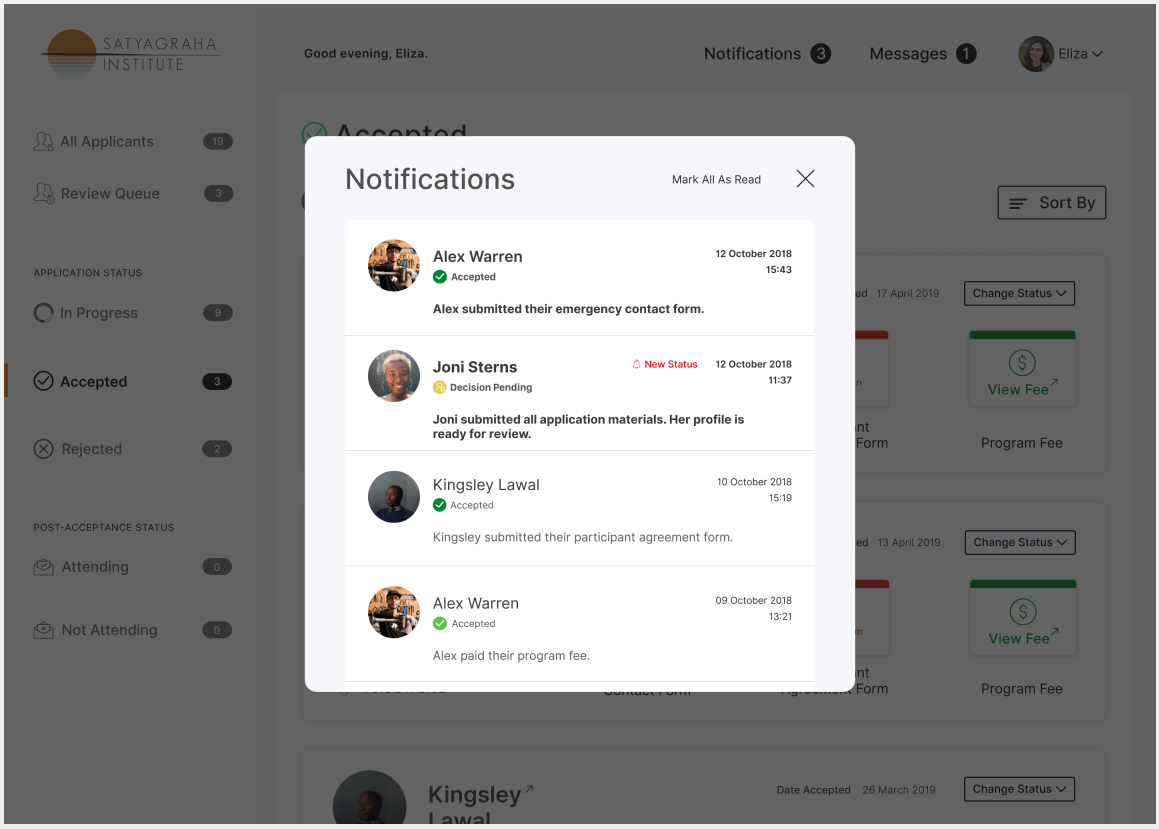
Dashboard / Messages



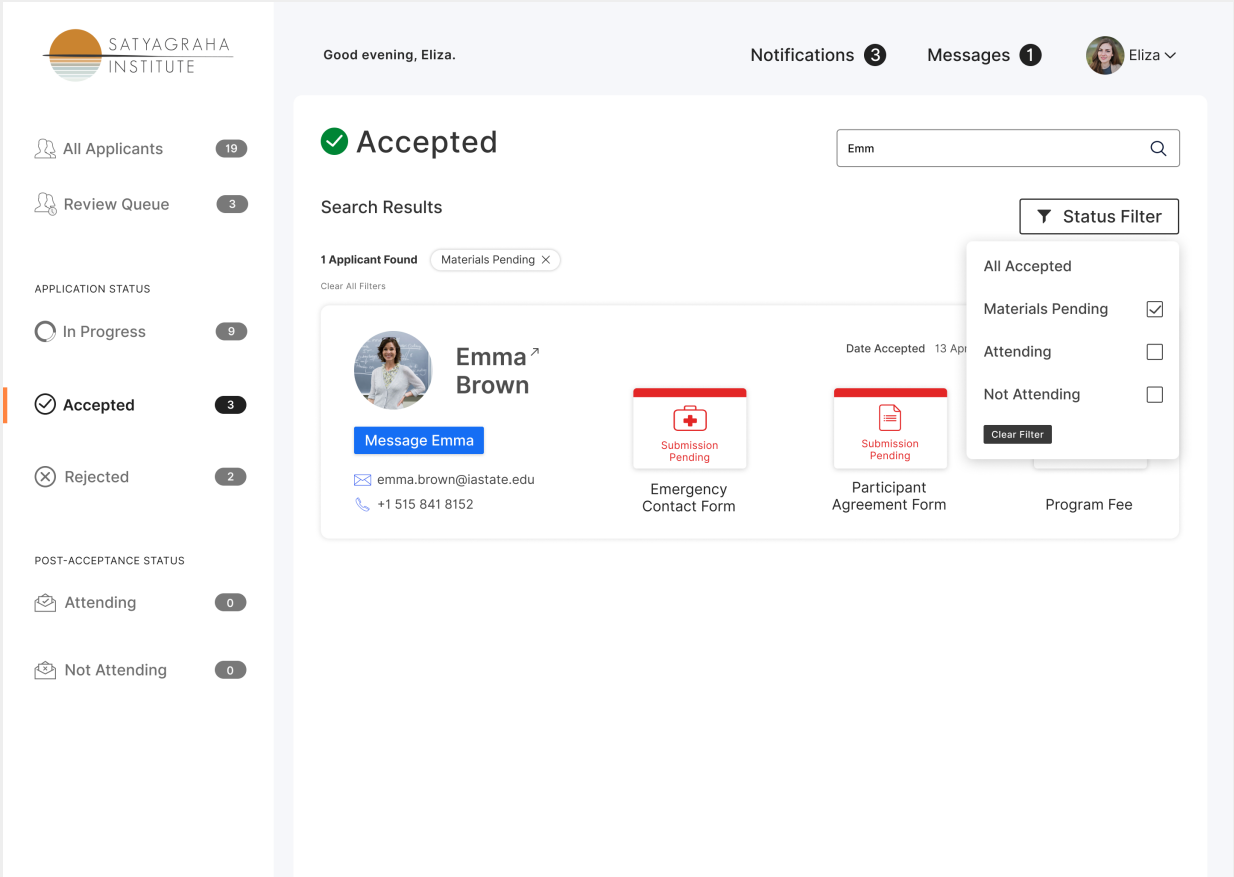


Dashboard / Notifications





Dashboard / Search Results



Profile States / Accepted Profile [1/2]

SATYAGRAHA INSTITUTE

Notifications (3) Messages (1) Eliza

Back

Profile Status: Accepted

Alex Warren

Message Alex

alex.warren@gmail.com

507 452 5844

Documents & Fees

Move To

View Form	View Form	View Details	Read Letter 1 Read Letter 2
Emergency Contact Form	Participant Agreement Form	Program Fee	Reference Letters

Basic Information

Name

Full Name
Alexander Warren

Preferred Name
Alex

Contact

Address
985 2nd Ave
New Ulm, MN 56073
USA

Email Address
alex.warren@gmail.com

Phone Number
507 452 5844

Demographics

Date of Birth
07 27 1989

Gender
Male

Citizenship
USA

Race/Ethnicity
White

Spoken Languages
English, Spanish

Profile States / Accepted Profile [2/2]

SATYAGRAHA INSTITUTE

Notifications 3 Messages 1 Eliza

← Back

Date Accepted 17 April 2019 Accepted

Alex Warren

Download All Materials

Change Status

Message Alex

alex.warren@gmail.com
+1 507 452 5844

View Form	Submission Pending	View Fee	Read Letters
Emergency Contact Form	Participant Agreement Form	Program Fee	Reference Letters

Basic Information

Name

Full Name
Alexander Warren

Preferred Name
Alex

Contact

Address
985 2nd Ave
New Ulm, MN 56073
USA

Email Address
alex.warren@gmail.com

Phone Number
507 452 5844

Demographics

Date of Birth
27 July 1989

Gender
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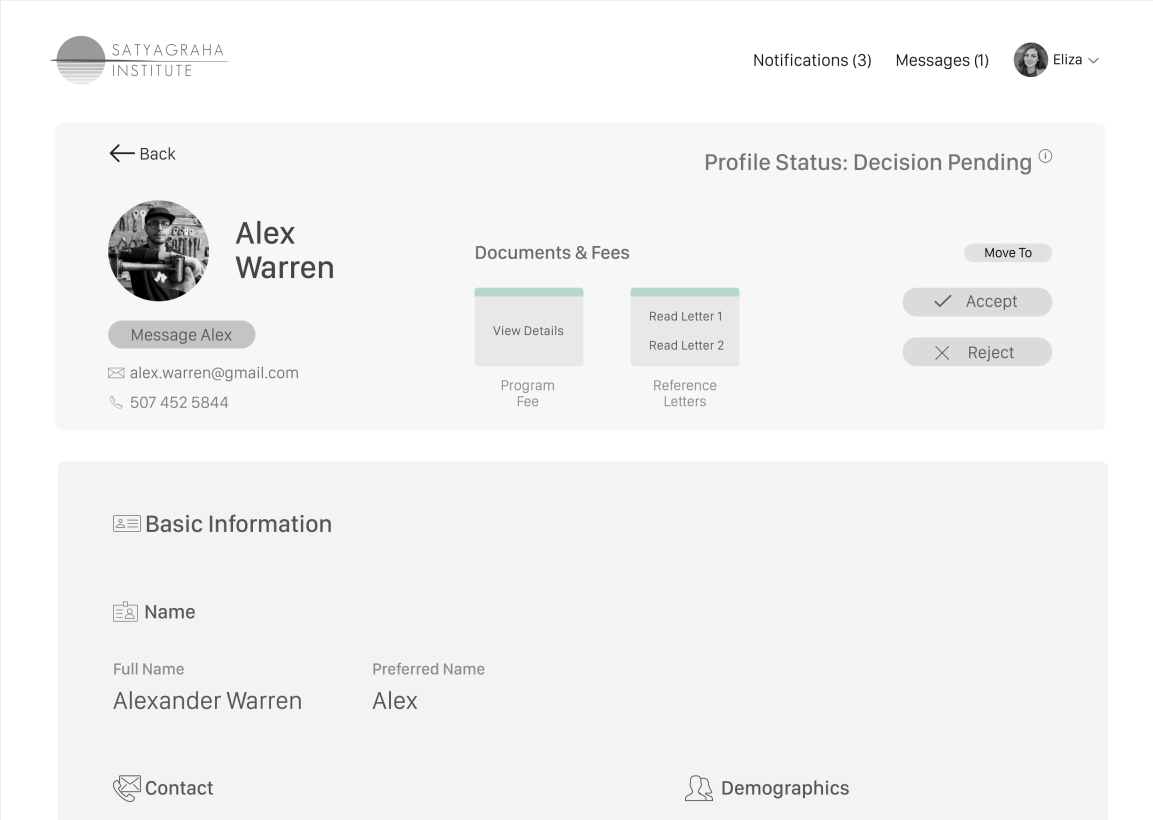
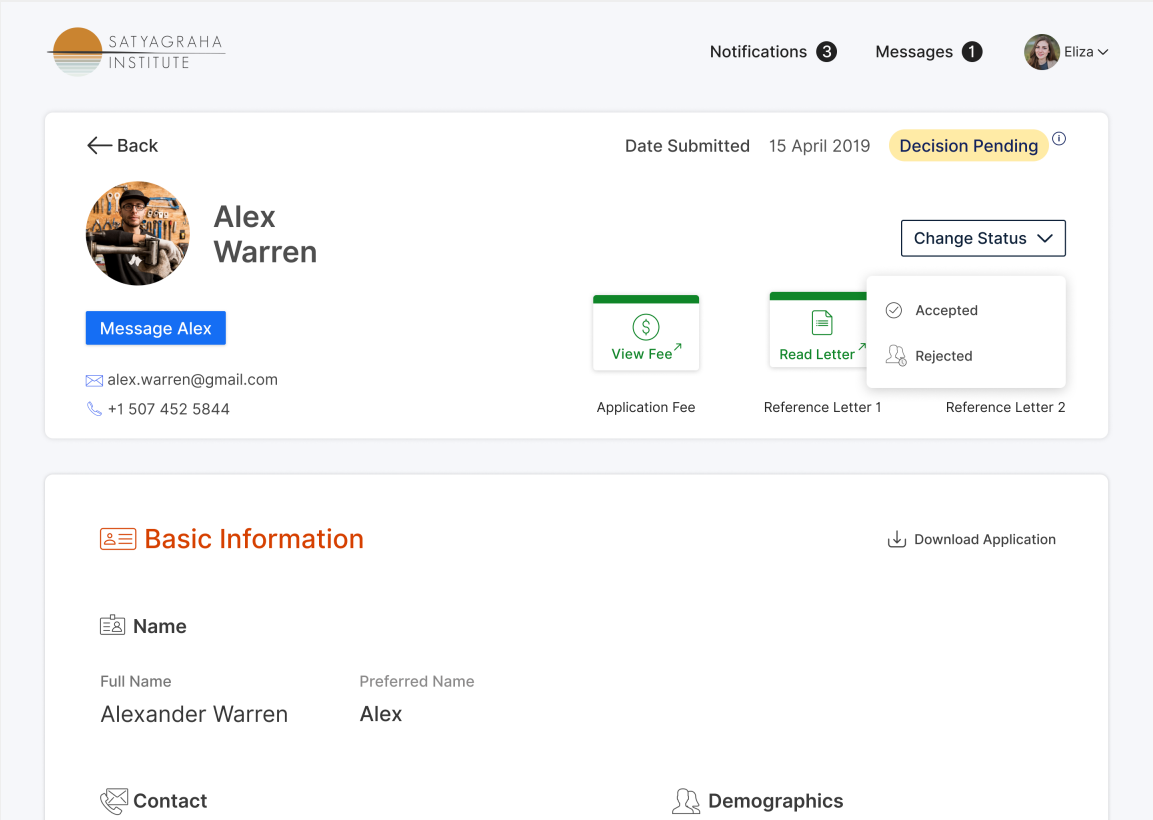
Citizenship
USA

Race/Ethnicity
White

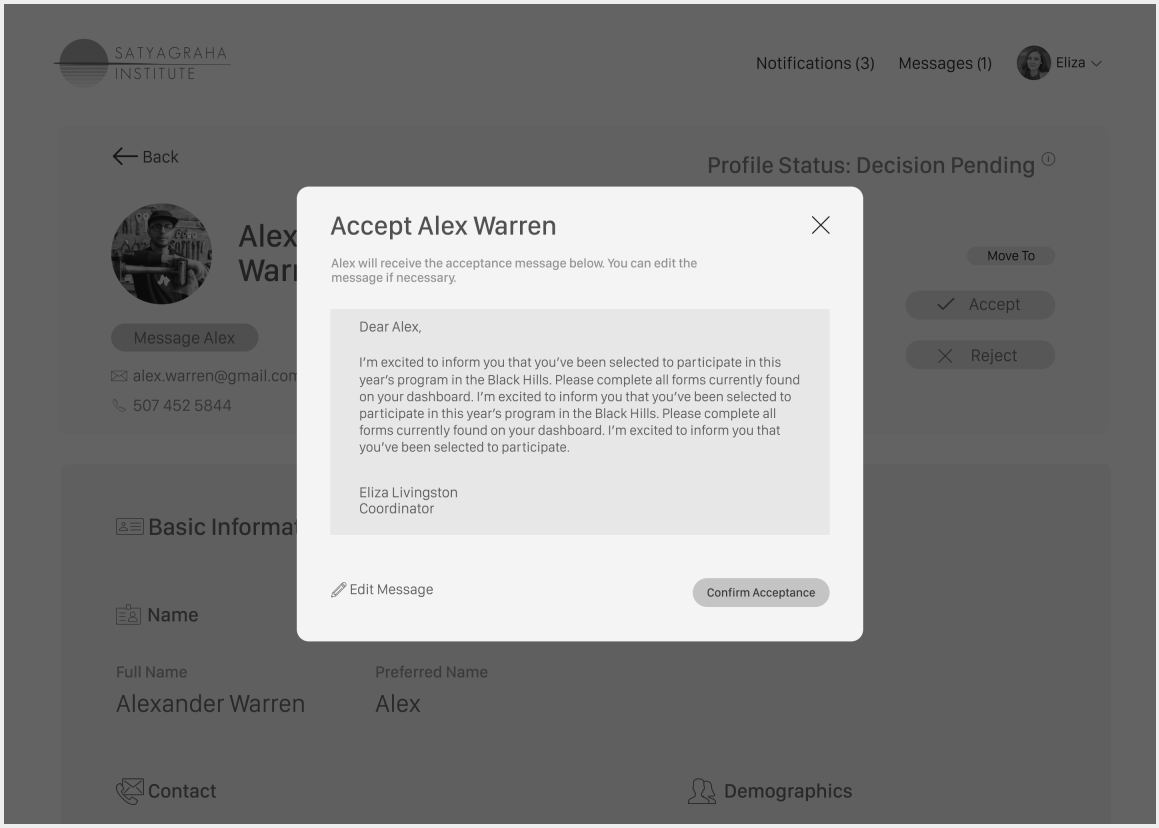
Spoken Languages
English, Spanish

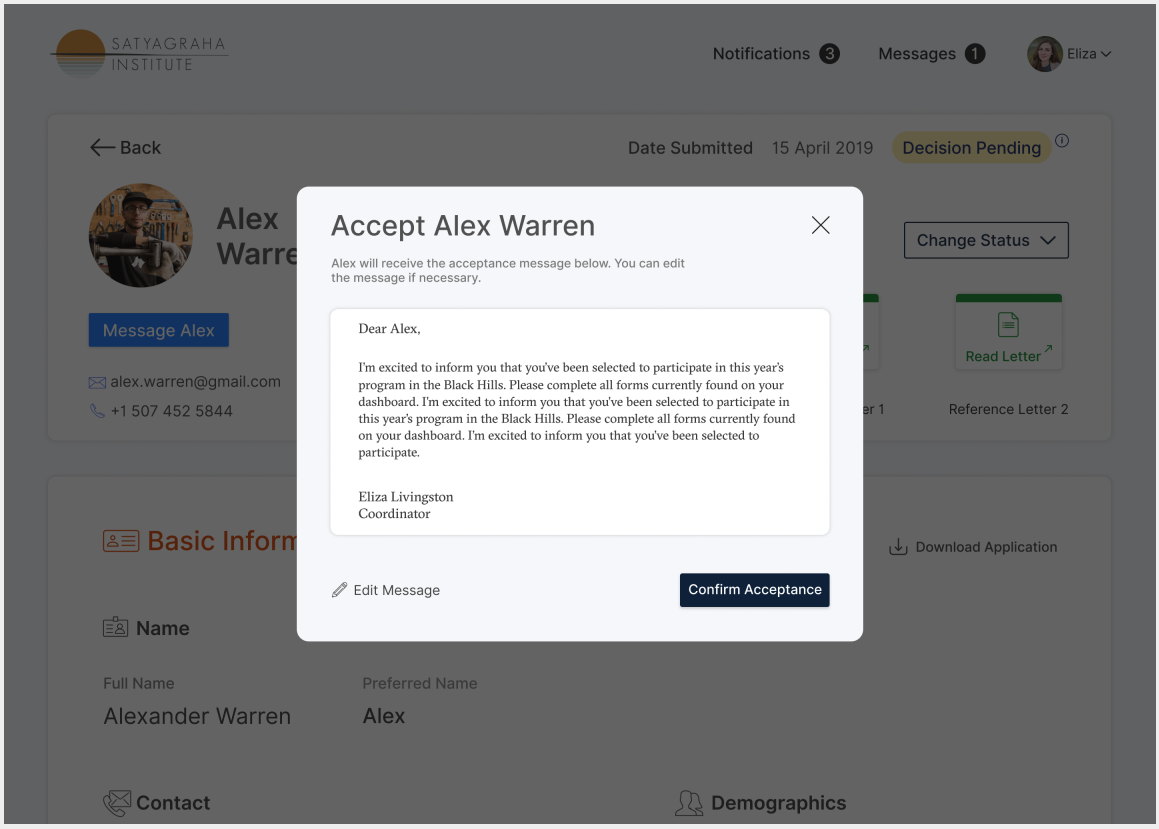
Profile States / Decision Pending



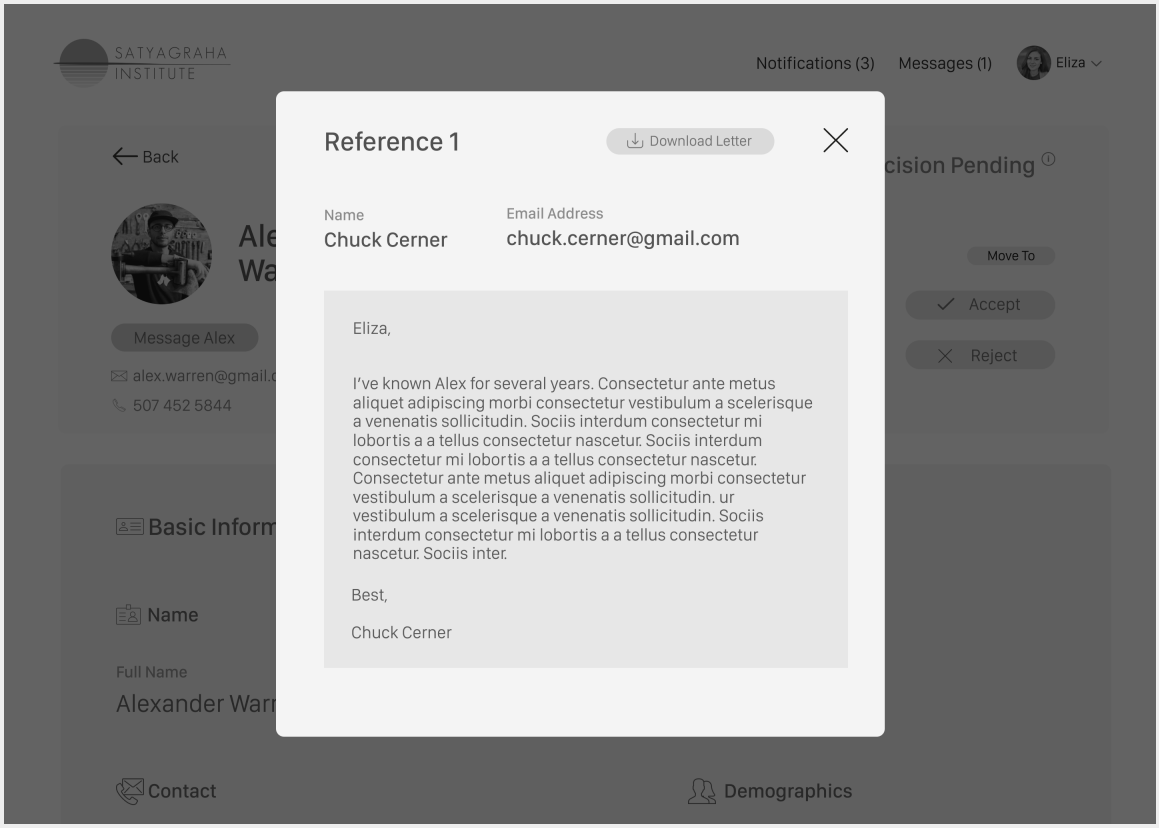


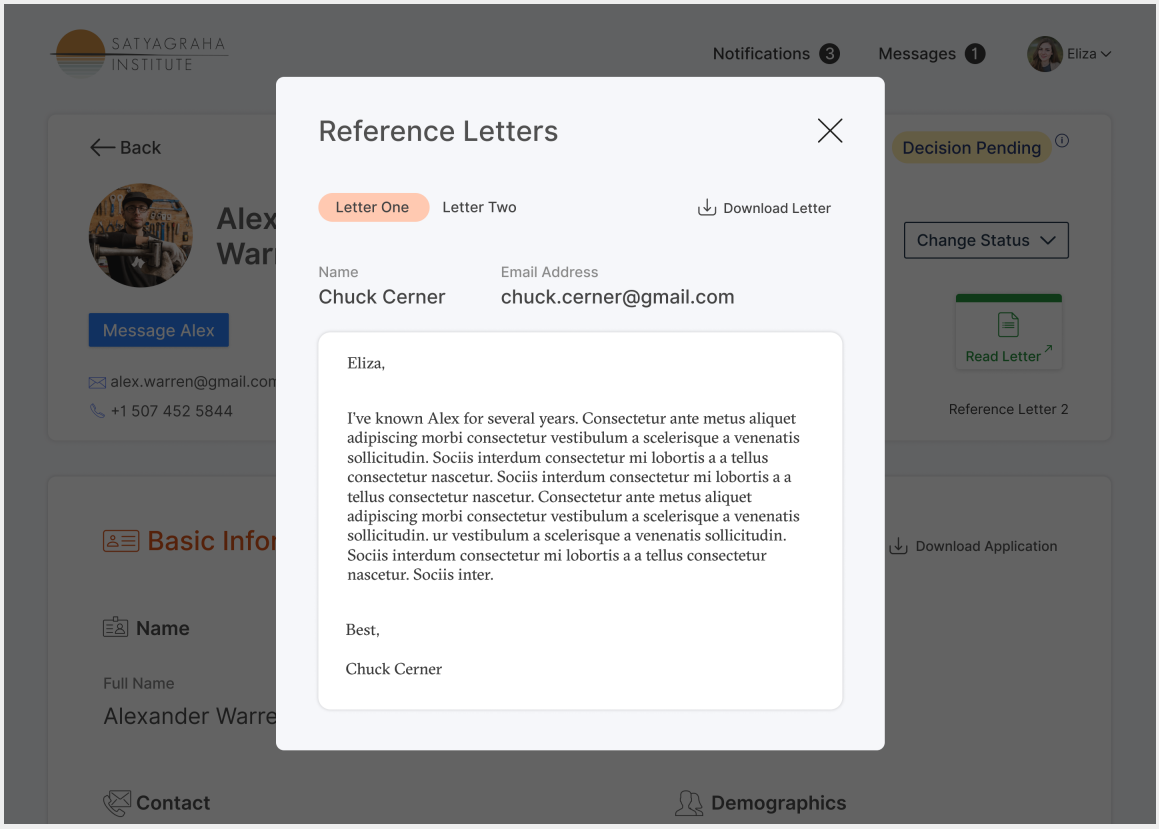
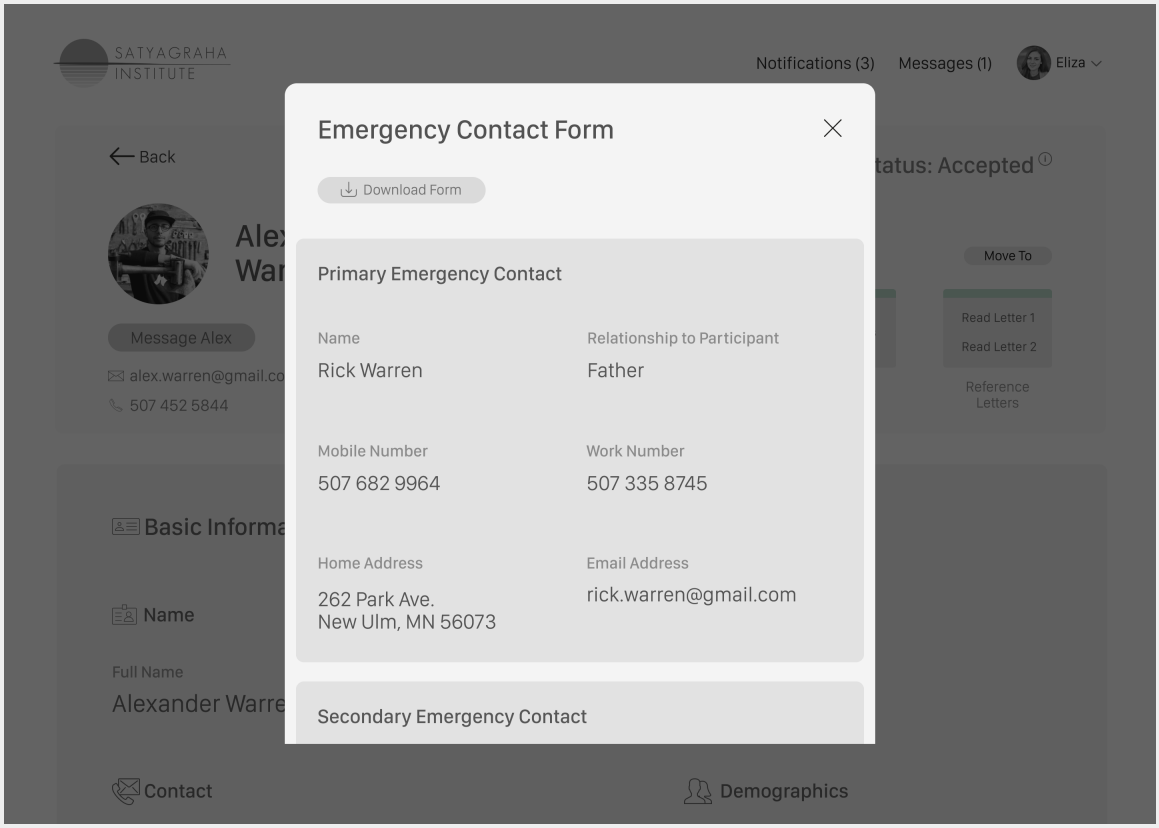
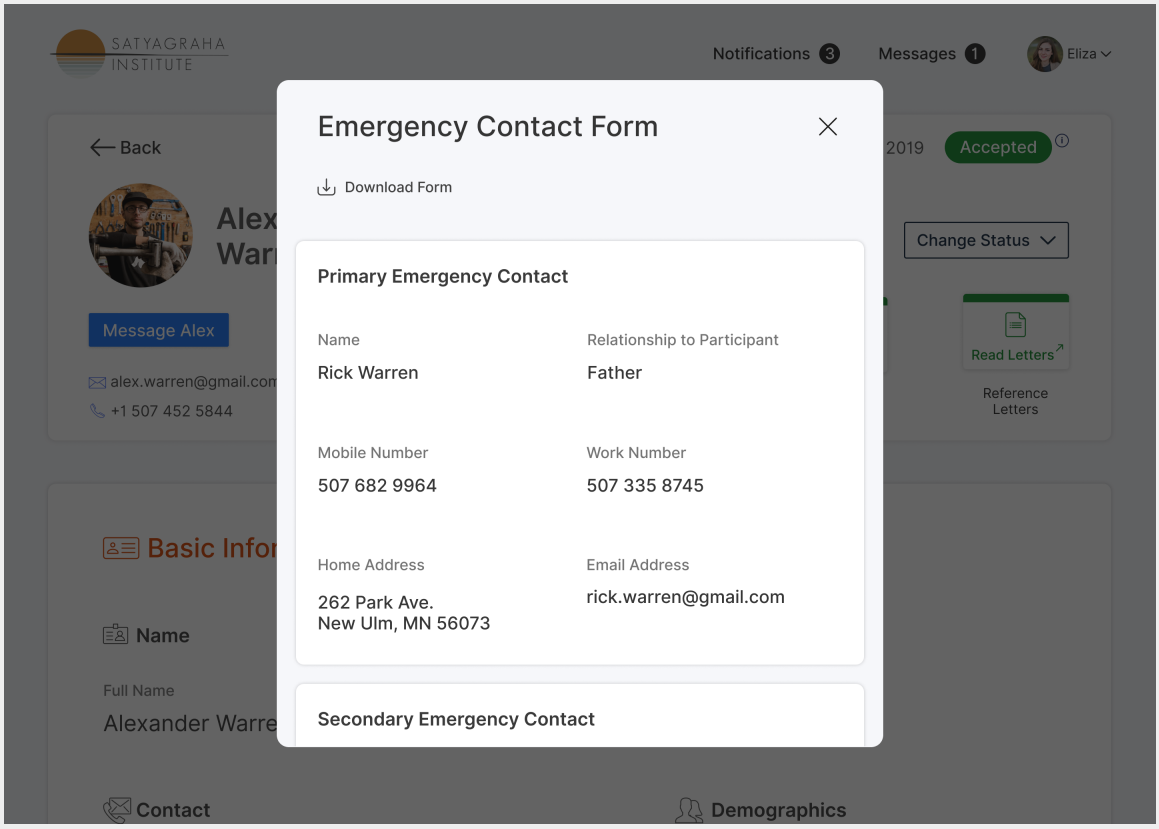
Profile States / Acceptance Confirmation





Profile States / Reference Letters





Profile States / Emergency Contact Form