**PrePlanKC updates 08-11-2014**

**Preplan for Yourself:**

1. The following statement needs to be placed on the Additional Information pop-up for all packages: The state of Missouri requires a State Reporting Fee of $36.00 which will be added to cost for Missouri residents.
2. Additional Funds page does not allow user to leave blank and continue. This should not be a required field. The user should be allowed to leave space blank and hit continue, which will result in no additional funds being added to cost.
3. On Contract form (Statement of Goods and Services) for Missouri, the additional $36.00 State Reporting Fee should be added to the package price for the following:
   1. Total Funeral Home Services – in both left and right columns
   2. Total Guaranteed Funeral Price – in the right column

**Preplan for a Loved One:**

1. The following statement needs to be placed on the Additional Information pop-up for all packages: The state of Missouri requires a State Reporting Fee of $36.00 which will be added to cost for Missouri residents – Same as #1 on Preplan for Yourself above
2. Additional Funds page does not allow user to leave blank and continue. This should not be a required field. The user should be allowed to leave space blank and hit continue, which will result in no additional funds being added to cost – Same as #2 on Preplan for Yourself above
3. On Enrollment form, the “MI” (Middle Initial) space for Proposed Insured/Annuitant needs to populate with the first letter of the Middle name of Insured from Personal Information-Insured page.
4. When I entered Missouri as state for Insured, the notice popped up as it should, but the $36.00 fee was not added to the cost on the Contract form (Statement of Goods and Services) and the Contract form (Statement of Goods and Services) for Missouri was not generated, it generated the form for Kansas. The fee was added to the total cost on the price summary on the WelcomePage.aspx on login, as well as the Enrollment form and Payment form.
   1. So, it appears the fee is adding correctly in all places, except the Contract form (Statement of Goods and Services)
   2. It looks as though the system based the Contract form (Statement of Goods and Services) on the Purchaser’s address, not the Insured’s address.
   3. This form must be based on the state of the **Insured** if type of arrangement selection is “Preplan for a loved one”. The fee is generating correctly, but the Contract form (Statement of Goods and Services) is not.
   4. This all worked correctly on arrangement for Yourself, but not for a Loved One.
5. Also, on Registration page, if arrangement is for a loved one, if user enters Missouri as state, the Contract form (Statement of Goods and Services) for Missouri is generated, even if Insured’s state is not Missouri (I selected Kansas for the state on Personal Information-Insured page for this test).
   1. This form must be based on the state of the **Insured** if type of arrangement selection is “Preplan for a loved one”.
   2. The fee is generating correctly, but the Contract form (Statement of Goods and Services) is not.

**Admin:**

1. Please add a column to admin panel for Insured, after Purchaser
2. Please reverse the listing order so the newest arrangement will be listed first, and oldest arrangement will be last