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| 3100 | Create Master Account | This is a small-scale placeholder for a larger Account Management function that can have its own pattern.  The small scale approach does have the applicant first assessing the feasibility of a successful application through a preliminary screening process before going through the specific effort to create an account.  Enabling the Applicant to create and maintain an Account is called Account Management. The Account serves many purposes: enables the client to save a partially completed application and return to complete it later; serve as an electronic signature based on verification of identity; enables checking status; receiving requests electronically for supplemental information or clarifications, and submittal of supplemental information as needed. The Account also expedites the renewal process or handling any new statutory or regulatory requirements for information. |
| 3120 | Create Individual Accounts | The Public is handled differently than members of an organization where the organization submits the application such as a business license. An individual can be an applicant in the case of a professional license or a retirement application; in many instances though the individual is a member of an organization and is under the control of the organization for role and responsibility.  When the organization account is created the first individual is added. Other individuals will create an individual account include their organization. But the link to that organization can only be made by the Administrator authorized to link individuals. A tricky part is making certain that the Administrator only links people from their own organization and not accidently linking others.  There is a special class of individuals called agents. They may be linked to multiple organizations. For each organization the agent may have different roles and responsibilities. Smaller organizations may give more authority to an agent. Agents typically have business domain expertise to aid the organization in their applications. It is up to the business relationship of the Agent to its organizations to ensure that the privacy of each is maintained. The automated system could enable an unscrupulous agent to take information gained from access to one organization’s account and share it with another. |
| 31400 | Link Individuals to Master Accounts | The organization Administrator links individuals to the organization and assigns roles and responsibilities. |
| 3160 | Assign Role for Individual to Master Account | Each role has responsibilities that are defined across all organizations for the application. Each organization has to decide which one or more roles to assign to an individual to give them the appropriate level of capability within the application. |