



Streamline User Access Levels

Overview by Streamline Access Level

Role	Structure	Primary Purpose	Administrative Access	Task / Workflow Access	Audit Comparison	Audit Verification	Best Fit
Agency Admin	Agency	Full administrative access for the agency and the broadest task-management capabilities.	Yes	Full	Yes	Yes	Agency leaders or administrators who manage users, companies, and workflows.
Agency Task Comparer	Agency	Task and audit-focused access without agency administration or user-management permissions.	No	Limited	Yes	Yes	Agency users focused on tasks and audit comparison work.
Organization Admin	Organization	Administrative access for an organization, including company setup and organization-level participation.	Yes	Limited	Yes	Yes	Organization administrators who manage company-level setup and workflows.
Organization Compare Access	Organization	Audit comparison access plus participation in organization workflows, without administrative user-management rights.	No	Limited	Yes	Yes	Organization users who compare audits and participate in workflows.
Organization Task Manager	Organization	Task-oriented access for organization users who need to create and participate in supported workflows.	No	Limited	No	Yes	Organization users responsible for creating and managing tasks.
Organization Verifier	Organization	Verification-focused access designed primarily for audit review and verification.	No	Limited	No	Yes	Organization users whose primary responsibility is audit verification.
Company Verifier	Company	Company-level verification access for users who need to verify audits without broader administrative access.	No	No	No	Yes	Company-level users who only need audit verification access.

How to choose an access level

Start with where the user sits in your structure (Agency, Organization, or Company). Then choose the role based on whether the user needs administrative access, task/comparison access, or verification-only access. Some permissions may depend on subscription features, billing-contact status, or the level at which the user is permitted to manage other users.



Powered by
DATA MANAGEMENT SOLUTIONS

Streamline User Access Guide

Detailed Permissions by Streamline Access Level

Legend: ✓ Available — Not available Text Conditional or limited access

General							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can Create an Organization	—	—	—	—	—	—	—
Can Create a Company	✓	—	✓	—	—	—	—
Can add/edit Agency details	—	—	—	—	—	—	—
Can add/edit Organization details	—	—	—	—	—	—	—
Can add/edit Company details	✓	—	✓	—	—	—	—
Can Create an Agency User	—	—	—	—	—	—	—
Can create an Agency/Organization Connection	—	—	—	—	—	—	—
Can create a Organization User	✓	—	✓	—	—	—	—
Can create a Company User	✓	—	✓	—	—	—	—
Can resend a User Registration Invitation	✓	—	✓	—	—	—	—
Can deactivate a user	Yes but only on those levels that they can create	—	Yes but only on those levels that they can create	—	—	—	—
Can delete a user	—	—	—	—	—	—	—
Can create custom email templates	Yes if subscription includes	—	Yes if subscription includes	—	—	—	—
Can change billing contact on Agency or Org user	—	—	—	—	—	—	—
Can add and edit Organization Service Type	✓	—	—	—	—	—	—
Can view Service Type	✓	—	Yes, if Billing Contact	Yes, if Billing contact	Yes, if Billing Contact	Yes, if Billing Contact	—
Can be assigned as Organization Contacts	✓	—	✓	✓	✓	—	—
Can add/edit/delete Ben Admin to Organization	✓	—	✓	—	—	—	—
Can view Ben Admin in Organization	✓	✓	✓	✓	✓	✓	—

Client Implementation							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can Kickoff a Client Implementation	✓	—	✓	—	—	—	—
Can be assigned a client implementation	✓	—	Yes as Org Contact Only. Not an Assignee	Yes as Org Contact Only. Not an Assignee	Yes as Org Contact Only. Not an Assignee	—	—
Can delete Client Implementation	✓	—	—	—	—	—	—
Can add comment in implementation	✓	—	✓	✓	✓	—	—

Client Migration							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can Kickoff a Migration	✓	—	✓	—	—	—	—
Can be assigned a migration	✓	—	Yes as Org Contact Only. Not an Assignee	Yes as Org Contact Only. Not an Assignee	Yes as Org Contact Only. Not an Assignee	—	—
Can delete client migration	✓	—	—	—	—	—	—
Can add comment in migration	✓	—	✓	✓	✓	—	—

Carriers and Renewals							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can Kickoff a Group Renewal	✓	—	—	—	—	—	—
Can delete Renewal	✓	—	—	—	—	—	—
Can add/edit carriers	✓	—	✓	✓	✓	—	—
Can add/edit plans	✓	—	✓	✓	✓	—	—

Eligibility Management Task							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can Kickoff a File Implementation	✓	—	—	—	—	—	—
Can Kickoff a File Renewal	✓	✓	—	—	—	—	—
Can create an Eligibility Management Task	✓	✓	✓	✓	✓	—	—
Is yes to Eligibility Management Task, what types can be created?	All available	All available EXCEPT for File Implementation	Issue only	Issue only	Issue only	—	—
Is yes to Eligibility Management Task, can I assign to user or agency?	✓	✓	No, defaults to Agency Support email	No, defaults to Agency Support email	No, defaults to Agency Support email	—	—
Can delete task	✓	✓	—	—	—	—	—
Can close task	✓	✓	—	—	—	—	—
Can reopen task	✓	✓	—	—	—	—	—
Can be assigned a task	✓	✓	—	—	—	—	—
Can add comment to task	✓	✓	✓	✓	✓	—	—

Support Task							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can create a Support Task	✓	✓	✓	✓	✓	—	—
Is yes to Support Task, what types can be created?	All available	All available	All available	All available	All available	—	—
Is yes to Support Task, can I assign to user or agency?	✓	✓	No, defaults to Agency Support email	No, defaults to Agency Support email	No, defaults to Agency Support email	—	—
Can delete task	✓	✓	—	—	—	—	—
Can close task	✓	✓	—	—	—	—	—
Can reopen task	✓	✓	—	—	—	—	—
Can be assigned a task	✓	✓	—	—	—	—	—
Can add comment to task	✓	✓	✓	✓	✓	—	—

Audit Task							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can create an Audit Task	✓	✓	✓	✓	✓	—	—
Is yes to Audit Task, what types can be created?	All available	All available	All available	All available	All available	—	—
Is yes to Audit Task, can I assign to user or agency?	✓	✓	No, defaults to Agency Support email	No, defaults to Agency Support email	No, defaults to Agency Support email	—	—
Can delete task	✓	✓	—	—	—	—	—
Can close task	✓	✓	—	—	—	—	—
Can reopen task	✓	✓	—	—	—	—	—
Can be assigned a task	✓	✓	—	—	—	—	—
Can add comment to task	✓	✓	✓	✓	✓	—	—

Audit							
Functionality	Agency Admin	Agency Task Comparer	Organization Admin	Organization Compare Access	Organization Task Manager	Organization Verifier	Company Verifier
Can create a comparison	✓	✓	✓	✓	—	—	—
Can create mappings	✓	✓	✓	✓	—	—	—
Can create data points/export templates	✓	✓	✓	✓	—	—	—
Can verify an Audit	✓	✓	✓	✓	✓	✓	✓
Can be assigned as a verifier	✓	✓	✓	✓	✓	✓	✓

IMPORTANT: Access to certain tasks and workflows may depend on your organization's **subscription, billing-contact status, task assignment, and configuration.**