



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.