



User Manual and Reference Guide

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System Automation

Enabling Responsive Government

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Introduction

MyLicense Office[®] is the next generation of System Automation's License 2000 product family. It is an end-to-end system for regulation management that combines all of an agency's licensing and enforcement functions into an integrated solution. Some of the standard features of MyLicense Office include:

- **Initial Applications**
- **Renewal Processing**
- **Accounting/Payment Processing**
- **Enforcement (complaints and compliance)**
- **Inspections**

There is tremendous flexibility to control the look, feel and flow of the pages and panels and, many other attributes of MyLicense Office[®] based on user roles and tasks.


The information contained in this manual is for general information. This manual is organized by function and probable use and should be used as a guide to understand the basic flow of the MyLicense Office[®] application. Detailed functions are configurable and your System Administrator may have configured some functionalities of MyLicense[®] differently than described in this manual.

Conventions Used:

In order to make this manual easy to use, certain conventions were adopted:

Boldface text – This text is formatted for certain selections and objects including: menu items, buttons, drop-down boxes, field names and panel names.

Using the “>” symbol – The **Next** symbol is used to represent movement from one selection on a menu, panel or page to a following selection. For example, **Applicant > Create** indicates that you should select the **Applicant** module from the **Navigation** menu, and then select **Create** from the **Applicant** module submenu **Create**.

Notes, Tips and other items of concepts or special note are indicated using the memo  symbol.

Hyperlinks – The electronic version of this manual contain hyperlinks, which is a navigation element in this manual that refers to another specified section of this document. Typically, it is used to cite, cross-reference or to expand on a concept and is indicated by blue text: See: [Guide to the User Interface: Navigation and Terminology](#). Selecting the hyperlink automatically brings the user to the referred section and information.

Guide to the User Interface: Navigation and Terminology

This manual is designed to provide you, the user, with a clear concise explanation of how to utilize the software. However, as with any complex software program, there are important terms that you should be familiar with in order to understand the concepts illustrated within this manual. Listed below is a glossary and in depth explanation containing the terminology used throughout this reference guide.

Add/Edit Panels: Are accessed from either the **Add** or **Edit** tab on a *Listing-panel*. They contain data fields that can be updated or permit new records to be inserted. These panels incorporate the same data fields as those on the *Listing-panel*, which summarizes the data record. See: [Listing-panels:](#) , [Mini-panels](#).

Alert: A notification method that provides a warning that there is a potential problem with a licensee/license or that some action is needed. An *Alert* does not affect the approval or renewal of a license. A **Hold/Alert** can be placed against a person, facility, a license or licenses, or an entire profession. See: [Hold](#).

The following scenarios distinguish between Holds/Alerts placed on persons, licenses, and professions:

- **A Hold/Alert is placed against a licensee for failure to attend substance abuse counseling.**
- **A Hold/Alert is placed against a license for failure to pay required fees for the license.**
- **A Hold/Alert against a license might originate in a serious Complaint that applies to all licenses that the person holds in a given profession. In this scenario, the hold/alert is placed against the entire profession for that particular licensee so that all licenses for that person (within that profession) will be affected by the hold/alert.**

Aliases: Tracks previous names and social security number for applicants and licensees. Aliases may be added and viewed via the **Alias** mini-panel, which is accessed from the **Applicant > Edit** and **Licensee > Edit** modules. Aliases may also be added and viewed from the **Quick Lookup** module.


Allocate Payment: Applies payments made to specific fee accounts. Payments can be allocated in the **Licensee** module on the Receive Payment window or on the Payments tab using Actions/Allocate Payment.

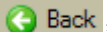


Applicant: is any person or facility that applies for a license. Applicants can be accessed from the **Applicant**, **Licensee** and **Quick Lookup** modules. Once approved for licensure, the applicant is referred to as a licensee.

Applicant Number: is a unique number that is associated with an applicant when the applicant record is created. Generally, it is used for searching and lookups. The **Applicant Number** field is also known as the **License ID**.

Application Status: See [Status: Application, License](#).

Attribute License: An **Attribute** of a license is an additional license, certification, permit or other credential that is associated with a primary license. For example, a licensed dentist may hold or apply for license **Attributes** in other branches of dentistry such as Orthodontics, a permit to administer General Anesthesia or to perform Oral Surgery. The **Attribute License** is in effect, credentials to practice in a specialized area of the principal license.

Back or **Back Button:** is a navigation element used to bring the user to a previous page or transaction. It is indicated by the  icon.

You cannot use the **Back** , **Forward**  or **Refresh**  buttons on your browser when navigating MyLicense Office[®].

Transactions will not process completely using these buttons and may cause additional errors. Instead, use the application's Back, Next, Finish and Save buttons.

Batch: is a technique for processing bulk data with little or no user intervention. Batches of data are prepared in advance to be processed during regular 'runs' (for example, each night). This is well suited to applications of a repetitive nature, such as certain accounting procedures, production of mail/email merges, and database updates and printing. For example, printing in batch allows multiple documents of one type to be printed in one process. For instance, all licenses processed on a daily basis can be printed at one time or all renewal notices for licensees of a certain license type can be printed together. Documents are sent to batch individually, but can be printed at the same time.

Battery: is an educational examination that consists of more than one exam. For example, the CPA Exam battery may consist of the Principles of Accounting and Federal Taxation exam types. The Battery score is the score associated with the battery of tests.

Breadcrumb: or breadcrumb trails is a navigation technique used throughout the MyLicense Office® user interface. Its purpose is to give users a way to keep track of their location within the application and its documents.

Breadcrumbs appear horizontally across the top of each page of the application, usually just above the main **Navigation** menu. They provide a trail for the user so they know where in the MyLicense Office® application they are currently located. Notice [Figure I-1](#), *Licensee > Employment Data*.



Figure I-1: Breadcrumbs

This indicates that the user is in the Licensee module of the program working with the Employment Data portion of it.

Calendar Control: There are many places within the program where a date can be set. The calendar control is a tool that makes setting the date very simple. Typically, next to any field that requires a date, an icon that appears as:



The calendar icon indicates that a calendar control option is available. If it is clicked on, it expands into a full size calendar that appears as:

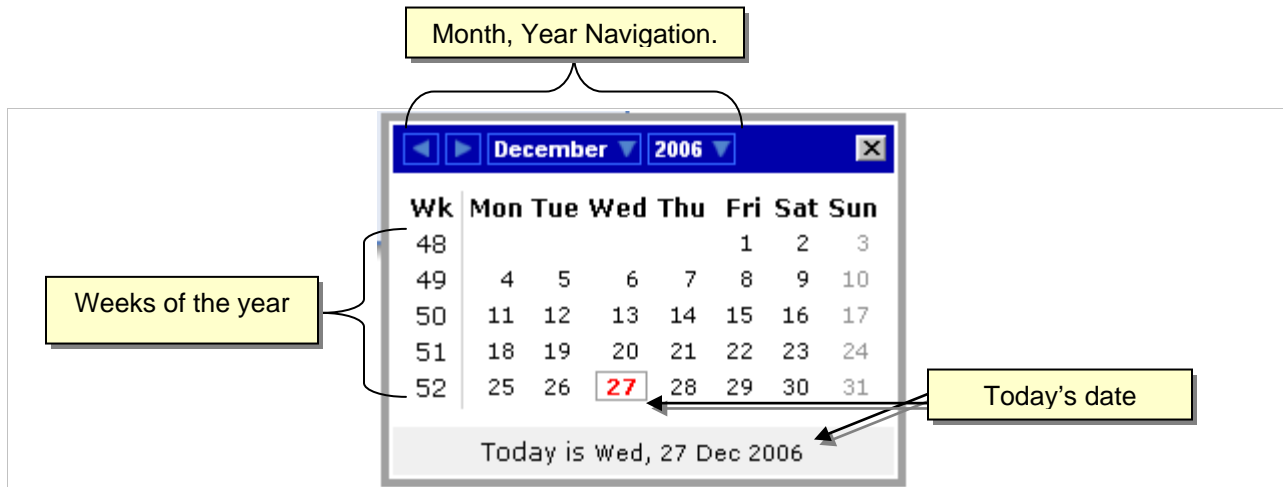


Figure I-2: Calendar Control Expanded

It defaults to the current date, which is in red with a small square around it. Today's date is always across the bottom of the calendar control window. The days of the week are across the top of the calendar. Wk is week. For instance, Wk 52 is the last week of the year.

Editing the date is very simple as well; notice that in the blue bar there are two horizontal arrows followed by the month with an arrow, and the year with an arrow. Clicking the right or left arrow will move the month forward or back one month. So in accordance with the above picture, clicking the right arrow will move the calendar to January of year 2007, and clicking the left arrow will move the calendar to November 2006.



TIP: There is an easier option to move through the dates however. Clicking on the month or the downwards arrow next to the month will yield:

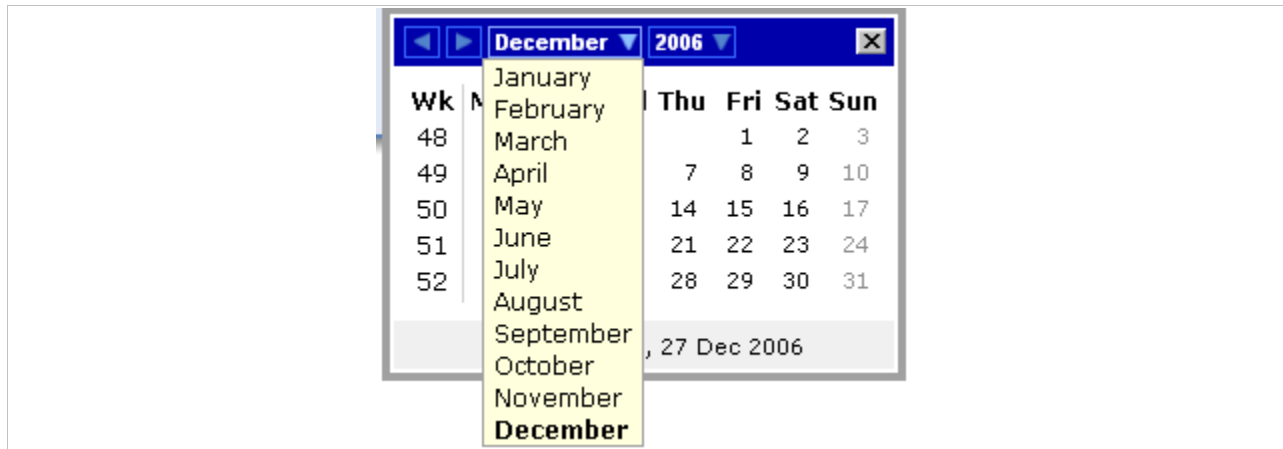


Figure I-3: Calendar Month Listing

Click on any month to select it. This will move the calendar to the month of whichever year is already selected.

Clicking on the **Year** or the downwards facing arrow next to the **Year** will yield a drop-down from which you may select the appropriate **Year**. See: [Figure I-4](#).

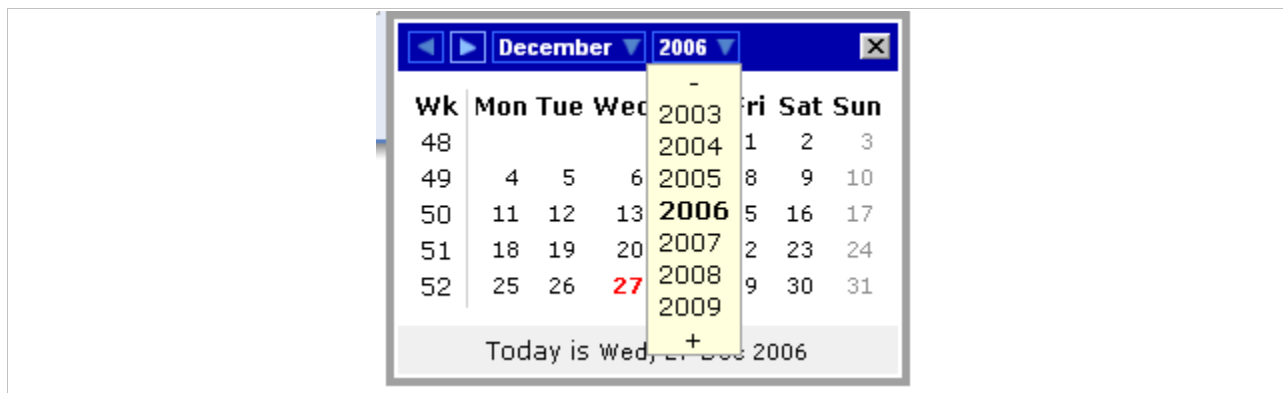


Figure I-4: Calendar Year Listing

If the year desired is already listed click on it to select it. If not, notice at the top and the bottom of the list, there is a + and – sign. Clicking on either of these will scroll the years forwards or backwards to allow future or previous years to be set.

Once the appropriate year and month are selected, simply click on the date in the calendar. The control will exit, and the field requiring a date will be automatically populate with the date selected.

Candidates: Are applicants or licensees who are prepared to take an educational examination, or have been given permission to take an exam.

CE: (Continuing Education): An education requirement that a licensee must complete in order to obtain a license or license renewal.

Clear or Clearing: This term refers to emptying out a text field, drop-down, checkbox or other control. For instance, *clear* the Alias checkbox would ask the user to remove the tick from the Alias checkbox.



Figure I-5: Cleared Checkbox

Figure I-6: Marked Checkbox

Checkbox: Activates a particular function, and its status is either "activated" or "not activated". You can activate a checkbox by clicking on it, and a tick will appear. In [Figure 5](#), the checkbox is currently "not activated". However, if you activate the checkbox, by clicking on it, a tick will appear to show that the checkbox has been activated as shown in [Figure 6](#).

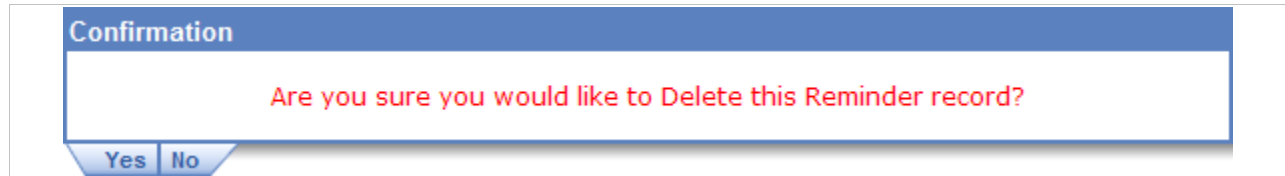
Click or Clicking: This term is used to indicate the pushing of the left mouse button once. Typically, clicking the **Back** button for instance would indicate the mouse cursor is moved over the object on the page labeled 'Back', and the left mouse button is pushed once.

Coded Values: MyLicense Office[®] uses application codes to provide flexibility in the way licensing agencies manage their licensing processes. Most application codes are displayed as drop-down lists. They give users the ability to select one value from a list of possible choices that have been set up for that field. There are many application code tables including Status, Fee Type, Batch Type, Inspection Type, and School Type, to name just a few. Values in the application code tables are modified by trained System Administrators.

Column Header: This term refers to the text at the top of a column. It is often displayed in blue, and can usually be clicked on to sort the data by that particular column or sort key. For instance, in [Figure I-7](#), the **Name**, **SSN**, **Applicant Number**, **Obtained By**, **License Type**, **Sub Type**, **App Date**, **Hold/Alert**, and **Application Status** are all examples of column headers. Clicking on a column header will sort the data shown by that column in ascending order. Clicking again will sort the data in descending order.

Delete: This term refers to a record or other object being removed from the database. For instance, if a **License Application** is deleted, the record of the application no longer exists. Once a deletion is confirmed, the record cannot generally be restored. Be very cautious when using delete.

When a delete transaction occurs, the **Delete Confirmation** will appear in one of two ways as follows:



Or



Figure I-9: Delete Confirmation

Double Click or Double Clicking: This is the same as clicking, but instead of pressing the button once, it is pressed twice in rapid succession.

Drop-Down List: A drop-down list displays options and coded values from which you can make a selection. You can select a choice by clicking on one of the values displayed in the list, which are generally displays alphabetically. Drop-down lists usually activate by clicking on a downward pointing arrow. Their label references the Drop-downs; [Figure I-10](#) is the **Profession** drop-down list.



Figure I-10: Drop-Down List

When the downward arrow is clicked, a list of the appropriate values for **Profession** drop-down is displayed.

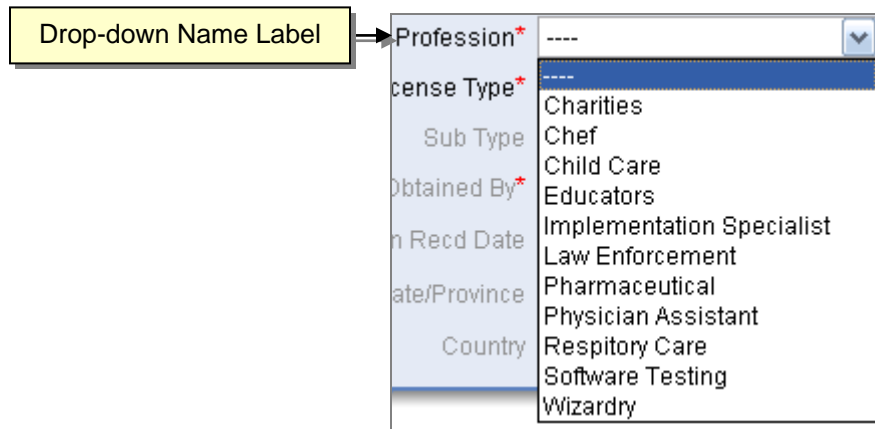


Figure I-11: Opened List

Select any of the items listed by clicking on it.



NOTE: MyLicense Office® permits System Administrators to define many of the drop-down list items. These are known as *coded values*, which are the values displayed in drop-down lists throughout the application. See your administrator concerning essential additions or deletion of those values no longer necessary.

Facility This term refers to an applicant or licensee that is a corporation or other business entity instead of an individual. For instance, a person known as James Hall has a license as a Pharmacist. He is a **Person** with a license. However, he may work for a pharmaceutical company known as RX Drugstore, Inc., which may have a license to conduct Pharmaceutical operations as a business. Thus, RX Drugstore, Inc. the **Facility** is the business or organization while John Hall is the **Person**. Facility can also be any business entity that may have a stake in licensing procedures such as law firms, insurance companies, educational institutions etc. See: [Person](#).

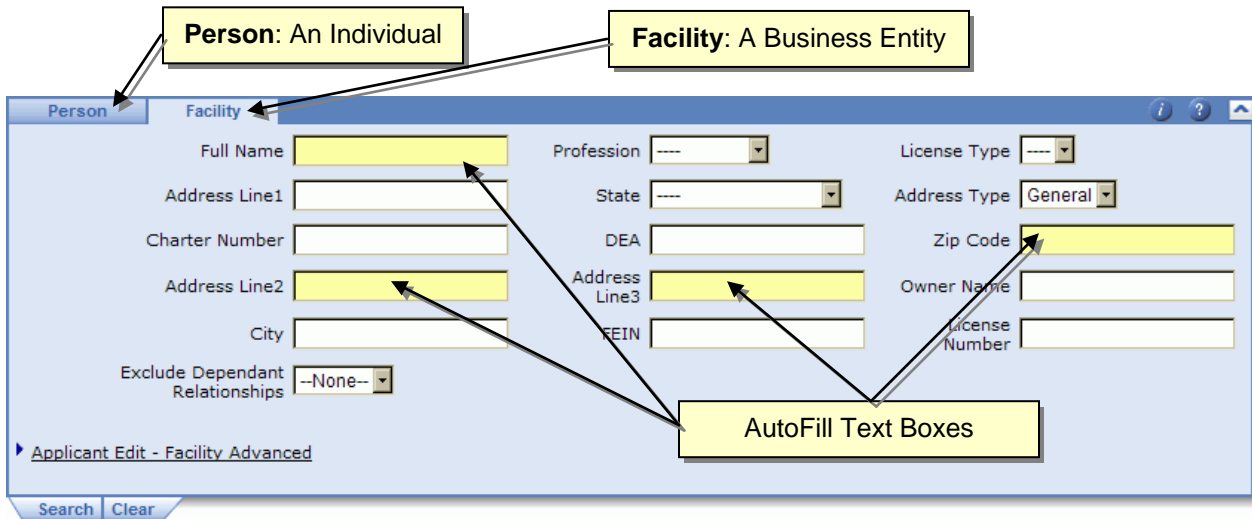


Figure I-12: Search Panel

Fields: Most fields within MyLicense Office[®] have certain attributes associated with them. For example, some fields are numeric whereas others are textual; some are long which can contain free form text such as remarks or notes, while others are short. In addition, every field has a name, called the *field name* and an associated label, which indicates its name.

In MyLicense Office[®], a field can be required, optional, read-only or calculated. A required field is one in which you must enter data, while an optional field is one you may leave blank. A read-only field is one where its data can only be viewed; it cannot be added or edited. A calculated field is one whose value is derived from some formula involving other fields. You do not enter data into a calculated field; the MyLicense Office[®] automatically determines the correct value.

A collection of related fields is called a *record*.

For instance, the following fields shown in the **Refund Information** panel make up a **Refund** record.

The screenshot shows a window titled "Refund Information" with a blue header bar. The window contains several data fields. Callout boxes with arrows point to specific fields:

- Read-Only Field:** Points to the "Payee" field, which contains the text "Payee Aaron, Hank".
- Calculated Field:** Points to the "Amount" field, which contains "\$225.00".
- Required Field:** Points to the "Refund Reason" field, which is a dropdown menu with "----" selected. The asterisk next to the label indicates it is required.
- Text Field (optional):** Points to the "Description" field, which is a large text area.
- Field Name Labels:** A bracket on the left side of the window groups the labels "Receipt Number", "Refund Reason", and "Process Status" together.

Other visible fields include "Date processed" with a date picker set to "01/12/2007" and "Date processed" with a date picker set to "mm/dd/yyyy". The "Process Status" field is a dropdown menu with "Initiated" selected.

Figure I-13: Data Fields

Google Tool Bar: is a *Browser Helper Object* (BHO) provided by Google. If these menu and tool bar options are installed and enabled in the browser in which MyLicense Office[®] is operating, some name and address related text fields would have a background color of yellow as in [Figure I-12](#). These fields provide for automatic entry of information stored in the AutoFill Settings of the BHO. Generally, this information pertains to the user and would not be useful in completing data entry in panels where the AutoFill feature would appear if the BHO were enabled.

Group Renewal: A process used to renew multiple licenses where there is a prerequisite licensee paying for renewal along with one or more subordinate licensees. For example, a business renewing its own license and the licenses of all its employees. See: [Generate Renewals](#).

Help: See: [Online Information](#):

Online Help

Hold: Unlike an Alert, A Hold indicates a more important problem associated with a license or licensee, and it does affect license renewal. See: [Alert](#).

Lic Deg Suffix The license degree type displayed after a licensee's name. For example, MD is typically displayed after a licensed medical doctor's name.

License: Any document, permit, certificate, registration, plate, tag, etc., issued to a licensee that gives formal permission from a governmental or other constituted authority to do something, as to carry on some business, profession or permission to practice.

Licensee: A person, facility, company, etc., who has been granted official permission to do or own a specified thing and to whom a license is granted or issued to do or own such.

License Requirements: Are based on profession, license type, and the method by which the license is obtained. Licensing agencies and departments control what is displayed for the corresponding license type and obtained by method. Each Requirement is assigned a status. By default, the status of a requirement is **Unchecked**. License Requirements may have multiple statuses as the application, reinstatement or renewal process proceeds. For example, **Application Fee**, **Certification of Graduation**, **Passport-Sized Photo** and **Proof of Good Moral Character** may be some of the requirements for licensure as a registered Nurse. Typically, these requirements will have a status of **Complete**, **Incomplete**, **Not Applicable**, **Unchecked** or **Waived**. See: [Requirements](#).

License Status: See [Status: Application, License](#)

Locum Tenens: A temporary license to fill a position for a time or temporarily take the place of a licensee.

- **Example: A doctor in a rural part of the state wants to go on vacation and needs another doctor to take care of patients while gone. The closest in-state doctor is more than 100 miles away, but there is a doctor in a town only five miles away – just across the state line. The out-of-state doctor is available to take care of the vacationing doctor's patients but does not have a medical license to practice in the vacationing doctor's state, so an application for Locum Tenens license is necessary.**

Link: This term refers to a word, string of text or an image, which when clicked points to another resource within MyLicense Office®. Clicking on a *Link* will usually change the page, expand the view of an object or jump to another area within the application. In [Figure I-14](#), the **License Type, 'Child Care Provider'** is a link. When the license link is clicked, the license record is selected and the page is refreshed displaying various mini-panels below the **Search Results** panel, which summarize licensing data regarding the selected applicant or licensee.

Name / License Type	SSN	Applicant Number	Obtained By	Sub Type	App Date	Hold/Alert	Application Status
Hall, James Child Care Provider		18	Application	Infant	07/06/2007		Pending

Figure I-14: Search Results Panel

Listing-panels: Are accessed from the **Details** button on a *Mini-panel* and displays the data that has been defined by the System Administrator for the records relevant to the *Listing-panel*. The *Listing-panel* uses the name of the *Mini-panel* from which it accessed plus the word "Information". *Listing-panels* often contain multiple rows of data. Where data is permitted to be inserted, an **Add** tab is provided. Where data is permitted to be edited or deleted, the data row is selected by clicking the link in the first column, the row will become highlighted. Then an update or delete transaction for the record can be executed. In [Figure I-15](#), the **Listing-panel: Inspection Information** was accessed from the **Inspection** mini-panel. It summarizes three different inspection records, which may be updated, deleted or a new record added. See: [Mini-panels](#), [Add/Edit Panels](#).

Inspection Status	Inspection Date	Inspection Id	Return Date	File Number	Scheduled Date	Inspection Type
Completed	07/09/2007	194	08/01/2007	101		
open	08/03/2007	313	09/03/2007	102		
open	10/01/2007	314	10/01/2007	103	10/01/2007	Follow-Up

Add Edit Delete

Figure I-15: Listing-panel

Login: The process for accessing a session with MyLicense Office[®] is controlled by authenticating the user in order to obtain credentials that permit access to and provide an audit trail of the use of the system. This identification procedure is an integral part of the system's security. A user can log in to MyLicense Office[®] to obtain access to the roles and privileges to which he or she has been assigned, and then log out when access is no longer needed. See: [Security](#).

To log in to MyLicense Office[®], a **Username** and **Password** are required; The *Username* (a unique sequence of characters) that represents the user will be assigned by the System Administrator. A *Password* provides the user with a key to MyLicense Office[®] and is kept secret from others. System Administrators may periodically require users to update their passwords. With this feature enabled, the system will prompt users to update their passwords at designated intervals.

The **Login** panel shown in [Figure I-16](#) requires the user to enter the *Username* and *Password* in the text boxes provided. Click the **Login** button to authenticate.



Figure I-16: Login Panel

Both usernames and passwords are case-sensitive in MyLicense Office[®]. For example, if you're **Username** is: 'MyUserName', you will not be able to log in as 'Myusername' (notice the subtle difference in the case). The **Password** is also case sensitive.

Logoff: To *logoff* is to close off one's session with MyLicense Office® after previously logging in. See: [Login](#). Logging off is done explicitly by the user by clicking the **Logoff** link shown in [Figure I-17](#).

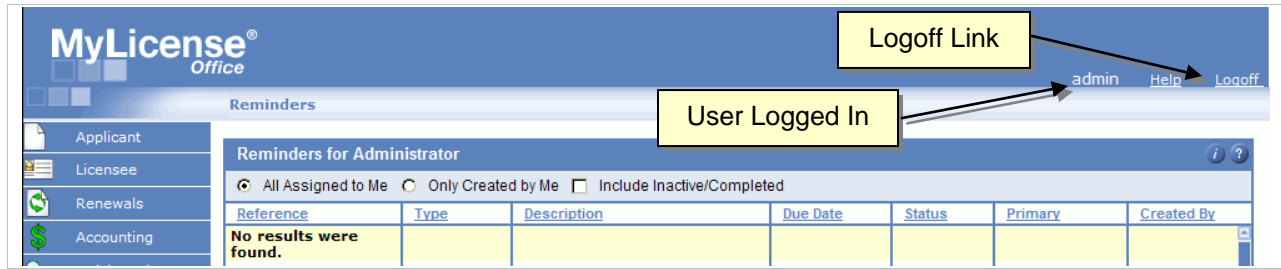


Figure I-17: Logoff

Logging out of MyLicense Office® when not using the system is a common security practice, which prevents unauthorized users from tampering with the application or your work. MyLicense Office® will automatically log off after a defined period of inactivity, requiring the user to log in again to regain access to the system.

Map It: The **Map It** link is a link provided on all panels containing address information. Clicking the **Map It** link will pass address information to MapQuest, which will generate a map of the location containing driving directions, nearby places, hotels and other information and services related to the address location.

Click the **Map It** link to open MapQuest in a new browser. When MapQuest is closed, users are returned to the address panel from where MapQuest was launched. See: <http://www.mapquest.com/>.

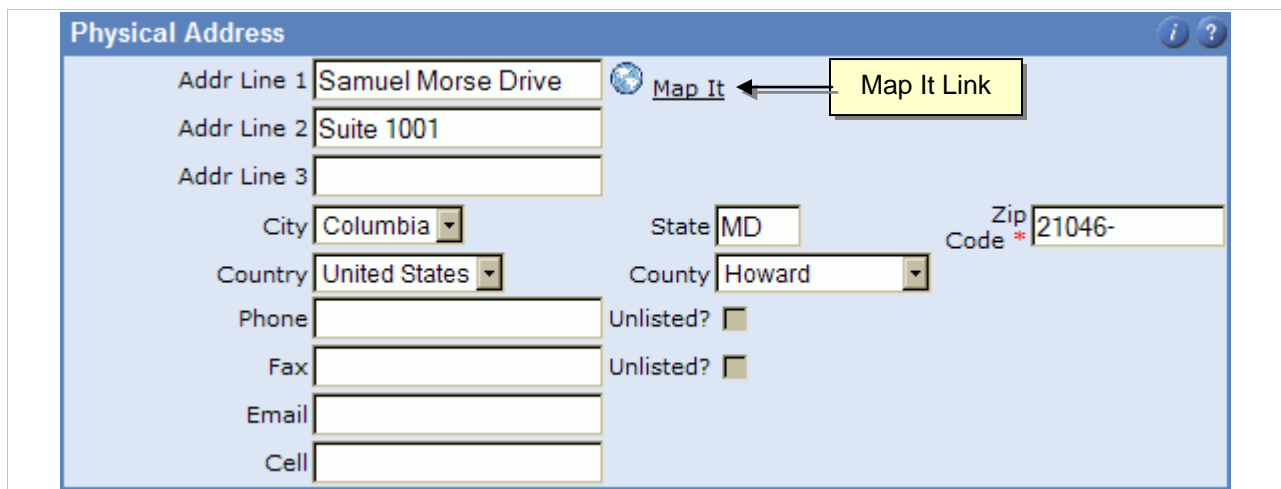


Figure I-18: Map It Link

Mark: This term refers to the action of marking something, typically a checkbox. The checkbox [Figure 19](#) is considered cleared, unmarked or not activated. The checkbox: [Figure 20](#) is considered marked, activated or enabled.



Figure I-19: Unmarked Checkbox

Figure I-20: Marked Checkbox

To either mark or clear a box, simply click the checkbox. A checkmark or tick will either be placed there (activating) or removed (deactivating) its function depending on the state of the checkbox.

Merge: A process of joining license/licensee data and a word processing template to create a letter or other document.

Merge Person A process of joining two separate license records for the same person.

Mini-panels: This term refers to a panel that displays summary data. It displays up to the first four data fields configured for the panel. **Mini-panels** can contain multiple data rows or records and are configured by your System Administrators.

The data represented is indicated by the name of the **Mini-panel** and displayed in its title bar. **Mini-panels** are most often the gateway to a module or expanded data via **Listing-panels** within the MyLicense Office® application. See: [Add/Edit Panels](#), [Listing-panels:](#), [Appendix A – Mini-panels](#).

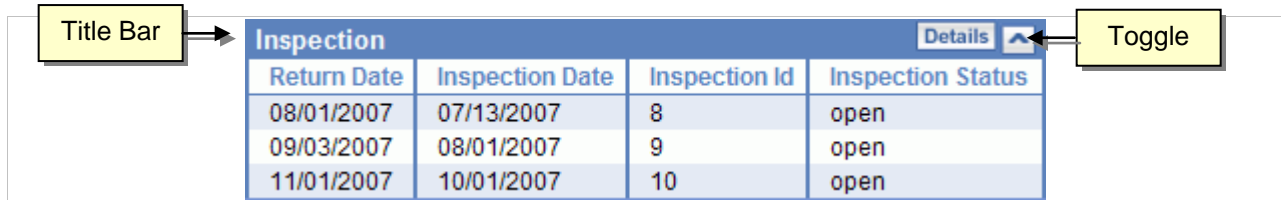



Figure I-21: Mini-panel Expanded

Toggle: The *Toggle*  button will collapse or expand the **Mini-panel**. After the toggle button is clicked once, the panel will collapse hiding everything but the title bar, as in [Figure I-22](#). Click again and the panel expands revealing its data. In MyLicense Office®, many different **Mini-panels** can be displayed at once. The technique of *toggling* the panels allows more panels to be incorporated on the same page while permitting the user to view only the information they wish to have displayed.

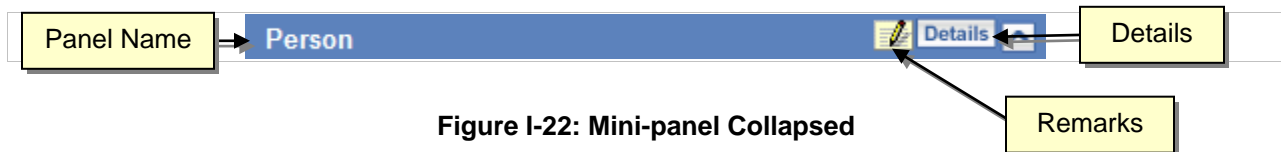





Figure I-22: Mini-panel Collapsed

Details: Clicking the *Details*  button will display other resources relating to the module or related records thereby, permitting the user to manage relevant data with expanded options and functionality. Typically, clicking the **Details** will launch related **Listing-panels** where **Add**, **Edit** and **Delete** functions are made available. See: [Listing-panels:](#).

Add Remarks: Some **Mini-panels** contain an icon that looks like a notepad with pencil . This icon indicates that within the **mini-panel**, there is a facility to record a free form remark, or other comments relevant to the selected record. Clicking the **Remarks** icon will display a **Remarks** panel where a remark or note can be inserted.

View Remarks: icon is a notepad without the pencil.  This icon indicates that a note or remark already exists. Click the icon to add, or view and in some cases, delete the notes or remarks.

Navigation Menu: This term refers to menu on the left side of the page. It is used as the main navigation method for MyLicense Office®. The individual aspects menus of the navigation menu can be expanded by clicking on it.

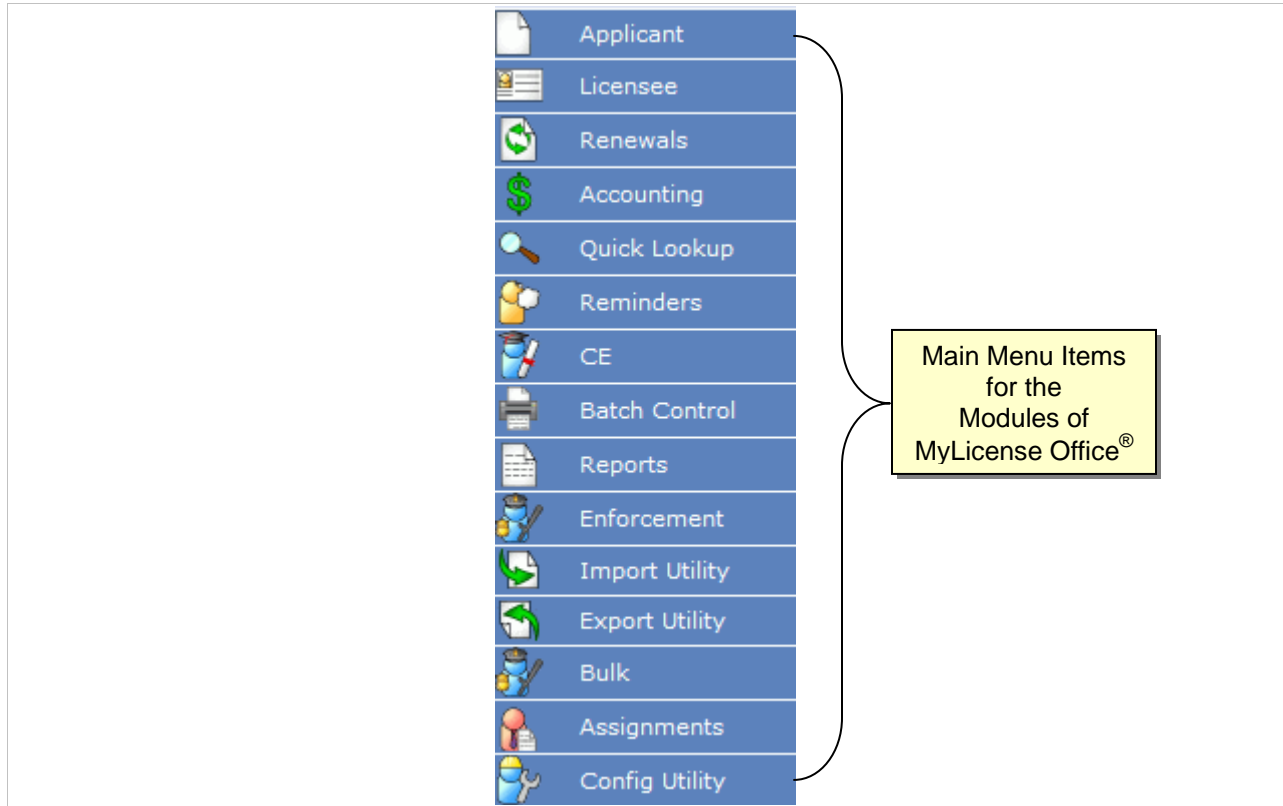


Figure I-23: Navigation Menu

Figure I-23 shows the **Navigation** menu before any action is taken. Clicking on *Applicant* would cause the **Applicant** module of the menu to expand and display its submenus so to appear as in Figure I-24.

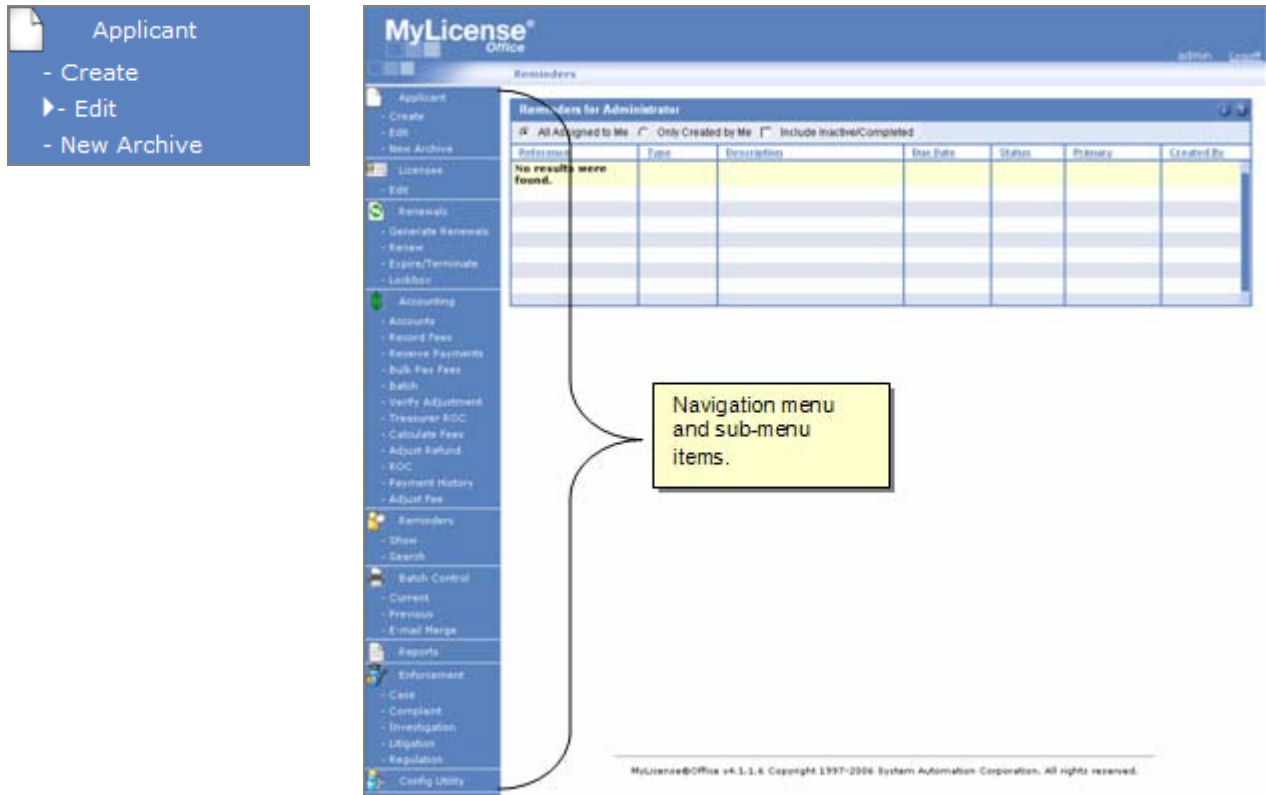


Figure I-24: Navigation Submenus

Clicking again on *Applicant* will cause the expanded aspect of the menu to collapse.

Non-Licensee Any entity recorded in MyLicense Office® for a reason other than holding a license. Among others, it may include inspectors, case personnel, attorneys, employers, educators and institutions, a complainant, an owner of a corporation or a payer for a licensee.

Obtained By Method: The method by which a licensee acquires a license for a specific profession and license type; i.e., application, reciprocity or examination. The requirements for licensure for each license type are based on the obtained by method.

Online Information:

Online Help: MyLicense Office® has a Help file integrated into the program. If you encounter a problem, forget a command or procedure while running the application, you can summon the help documentation by clicking the Help button located at the top right of each panel.

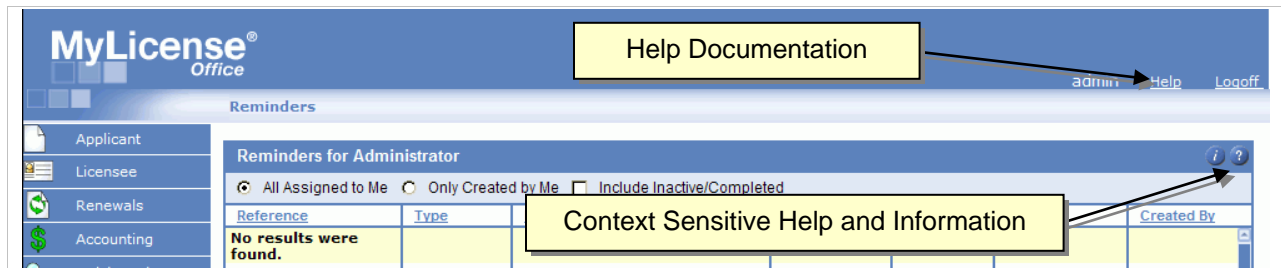


Figure I-25

Once you summon the Help system and depending on where you are in the application, the *Context Sensitive* Help will provide the necessary information for that particular panel.

The Online Help files also display a menu of Help topics. You can choose the appropriate topic for whatever problem you are currently encountering. The program will then display a help pages that contains the desired documentation.

Option Buttons: These are circular objects, which can be selected. Unlike *checkboxes*, only one option may be selected.

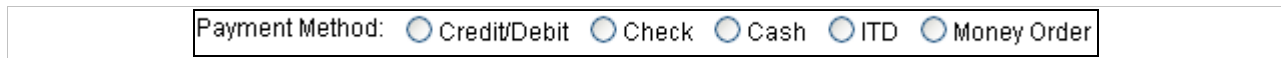


Figure I-26: Option Buttons

Clicking any of these *option buttons* will select it; meaning that is the choice. Typically, *option buttons* are reserved for choices. For instance, in [Figure I-27](#), only one option may be selected at a time.

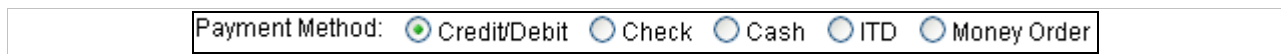


Figure I-27: Credit/Debit Selected

Only the **Credit/Debit** *option button* is selected. Selecting a different option would deselect the **Credit/Debit** option.

Option buttons are referred to by their label name. For instance, [Figure I-27](#) has a **Cash** option button. It is referred to by the label associated with it.

Person This term refers to an individual as opposed to a *Facility*. A person can hold a license or have an application within the system. A person can also be an attorney, complainant, witness or others who have interest in a license. James Hall is a person. He may have an application within the software. He may work for a restaurant known as Good Eating, which would appear as a *Facility* within the application if it were an applicant or held a license. However, an individual is known throughout the application as a person. The establishment is known as a facility. See: [Facility](#).

Precedence: A licensee can hold a succession of licenses. A license that is held prior to another license is the predecessor license, while the license that succeeds it is the successor license. For example, a pharmacy intern would be a predecessor to a pharmacist. When predecessors and successors are established, MyLicense[®] will automatically set the status of the predecessor license to Null and Void, once the successor license is issued.

Prerequisite: A prerequisite is a condition that must be satisfied before a license can be issued. It can be optional or required. For individuals, they must already possess a certain license type, before they can hold another type of license. For example, the prerequisite for a person applying to be a certified nurse practitioner (CNP) is that they already hold a registered nurse license. On the other hand, facilities must have properly licensed staff before licensure is granted. A pharmacy applying for a license, for example, must have a supervisor who is a licensed pharmacist before the pharmacy is issued a license. In MyLicense Office[®], a relationship is established between the primary "Prerequisite" license and the dependant or applicant's license. See: [Prerequisites](#).

Quick Reference: This term refers to an abbreviated set of instructions. It may be considered as job aids or cheat sheets for experienced users. These instructions do not have complete detail or illustrations concerning the subject matter. They are simply a quick set of directions to walk the end user through the various modules of MyLicense Office[®].

Clicking the Quick Reference



icon will navigate the user to the related topic of the Quick

Reference Guide.

Reinstate: An application process used to reactivate a lapsed, expired, or inactive license. The original license number and issue date are maintained. Licensees can either reinstate a license or reapply for a license, but not both. The ability to reinstate a license is determined by the System Administrator.

Renewal: A process that makes a license valid again after it has expired. Renewing a license requires certain criteria be met, which is determined by the license type.

Renewal Period: The time span in which a licensee may renew a license. The license type determines the length of the renewal period.

Required Fields: This term refers to any field that requires the appropriate data to be entered before the user is permitted to proceed or execute any additional functions. These fields are denoted by a red asterisk (*).

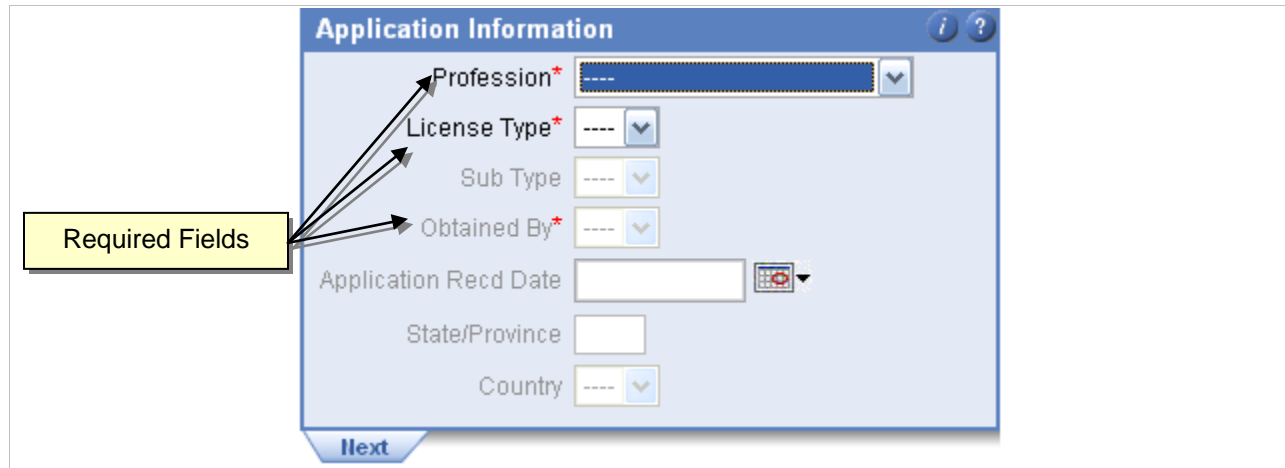


Figure I-28: Required Fields Display

In [Figure I-28](#), the **Profession**, **License Type** and **Obtained By** fields are all required. The remaining fields are optional. Notice how each *required* field is labeled with the red asterisk (*).

Requirements: is a list of required items that must be satisfied before an applicant is issued a license. Requirements may be viewed and processed via the **Requirements** mini-panel, which is accessed from the **Applicant > Edit** or **Licensee > Edit** and the **Quick Lookup** modules. See [License Requirements](#).

ROC Number: An assigned control number that tracks fees and payments by an applicant or licensee, and tracks any changes to those fees and payments.

Respondent: A party against whom a petition or a complaint is being made or one who answers or defends in various proceedings.

Search or Searching: This term refers to how the system is examined to find the records or data you are requesting. Defining a query for a search of the system can be extremely simple or very complex. If the search is based on one matching condition, such as "retrieve all applicants who live in Tennessee", only the **State** parameter would be selected to define the search. However, MyLicense® permits more complex searches using a combination of multiple search parameters to create very precise searches.

MyLicense Office® uses the *AND* technique of combining different search criteria to make the search more precise. Here is an example of how *AND* logic works:

- "Educator" is selected from the **Profession** drop-down list.
- "TN" is selected from the **State** drop-down list in [Figure I-29](#).

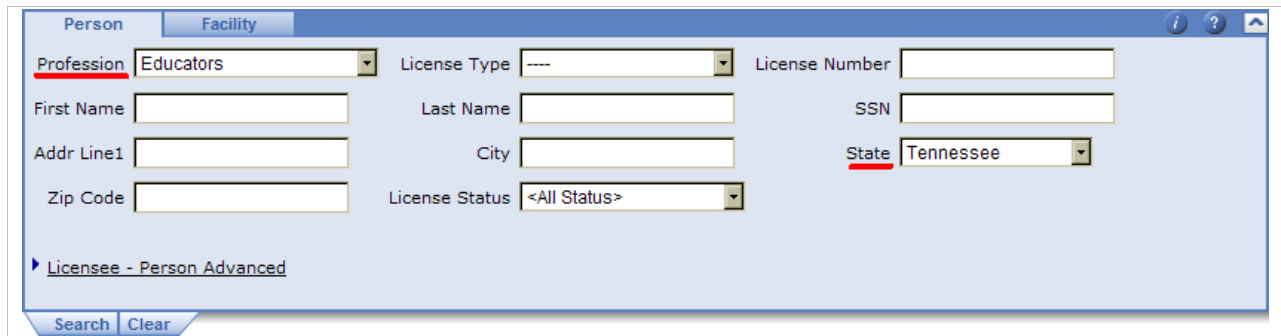


Figure I-29: Search Panel

In this search, records are retrieved in which *BOTH* of the selection criteria are present:

Persons whose profession is "Educators"
AND
Who are located in "Tennessee".



TIP: Search parameters that are unique such as SSN, Phone, and License Number etc. do not require additional selection criteria. This data can only belong to one person or facility although; they may have multiple applications or licenses, which in turn, would return multiple records in the result set.



TIP: As additional selection criteria are combined, the search is refined to produce a more precise data resulting in fewer records displayed in the **Search Results** panel.

MyLicense[®] search engine supports several advanced operators, which further define search criteria when querying for specific records. Click on the **Advanced** link at the bottom of the **Search** panel to display advanced search features.

In response to executing a search by clicking on the **Search** tab, MyLicense Office[®] produces a **Search Results** panel where lists of records that match the chosen criteria are listed. A record selected from the result set may be further processed.



NOTE: You can also submit the query by pressing the 'Enter' key.

Other typical functions of the **Search Panel** are listed in the following table:

- **Wild Card Search:** A wild card search allows you to search for part of a name. The wild card character in MyLicense Office[®] is an asterisk (*). For example, a search for Sy* would find System Automation Corporation as well as Sybase (providing both were entered in the system). Wild card searches can also be used when there is an uncertainty about a single letter in a name. For example, searching for O*Brien would find all versions of that name, such as O'Brien, O Brien, and OBrien. Wild card searches cannot be used with Soundex searches.
- **Alias Search:** A check in the "Alias Search" checkbox will result in the display of individuals/facilities with aliases like the name entered.
- **Archived Only Search:** When the "Archive" checkbox is checked, the search is conducted for archived records based on chosen search parameters inserted or selected in the various "Search" panel controls.
- **DBA Alias Search:** When the "DBA Alias" checkbox is checked, the search will be performed for matching business Alias records based and the chosen search parameters inserted in the various "Search" panel controls. **DBA Alias names are stored in the DBA Alias history.**
- **Non Licensee Search:** When the "Non Licensee Search" checkbox is checked, the search will be conducted for entities that do not hold a license and the chosen search parameters inserted or selected in the various "Search" panel controls.
- **Old Address Search:** If checked, searches are conducted for an old address. These addresses would be stored in Address history.

- **Soundex Search: A phonetic algorithm for indexing names by sound, as pronounced in English. The goal is for names with the same pronunciation to be matched despite minor differences in spelling. If checked, searches are conducted for records that sound similar to the search criteria. For example, if users search for a licensee with the last name of "PETERSEN," and enter the search criteria as "Peterson," MyLicense Office[®] will display all records that "sound like" Peterson, including PATERSON, PEDERSEN PEDERSON, PETERSEN, PETERSON, PETERSSSEN, PETERSSON, etc. It is very useful for searching large databases when the user has incomplete data.**
- **Show Licensees Only: If checked, only records for licensees and pending licensees will be displayed in the result set. Records for other, non-licensed persons or facilities that match the selection criteria will not be returned.**
- **Toggle: When a search is executed, the 'Search' panel will collapse to save space on the page. Click the "Toggle" button to expand the panel. Click again to collapse the panel. See: [Toggle](#).**



TIP: Searches are NOT case sensitive. All letters regardless of the case in which they are entered, will be understood as lower case.



NOTE: If the response your query exceeds two hundred records, MyLicense Office[®] will display a list of first two hundred records of the data set in the **Search Results** panel.



TIP: Generally, less selection criteria is preferred, since one misplaced character in any field can confound the search.



NOTE: To refine the search or return to the **Search** panel to conduct a new search, click the **Clear** tab on the **Search** panel. This will clear the existing search criteria allowing you to construct and submit a new query.

Security: Security throughout MyLicense Office® is accomplished by assigning roles to groups and security items, and assigning users to roles. Access to different areas in the application is determined by the roles that are assigned.

The system uses application level authentication based on user name and password to provide access to the system. Requiring users to update their passwords periodically is a configurable parameter in the system. With this feature enabled, the system prompts users to update their passwords at the designated intervals.

A role describes a group of users who have the ability to perform the same types of functions in MyLicense Office®. For example, a role called **Applicant Create** might describe all those users who can create an applicant record, while a role called **Accounts Adjust Fee** might describe those users who are authorized to change licensing fees.

Select or Selecting: This term refers to choosing an object or the value of an object such as an item from a *drop-down* list and clicking on it. Selecting an item is moving the mouse pointer to the desired list value, record, icon, link, checkbox, option button etc. and clicking on it. You can select blocks of text by positioning the pointer at an end-point of the block and then dragging the pointer over the block. See: [Mark](#).

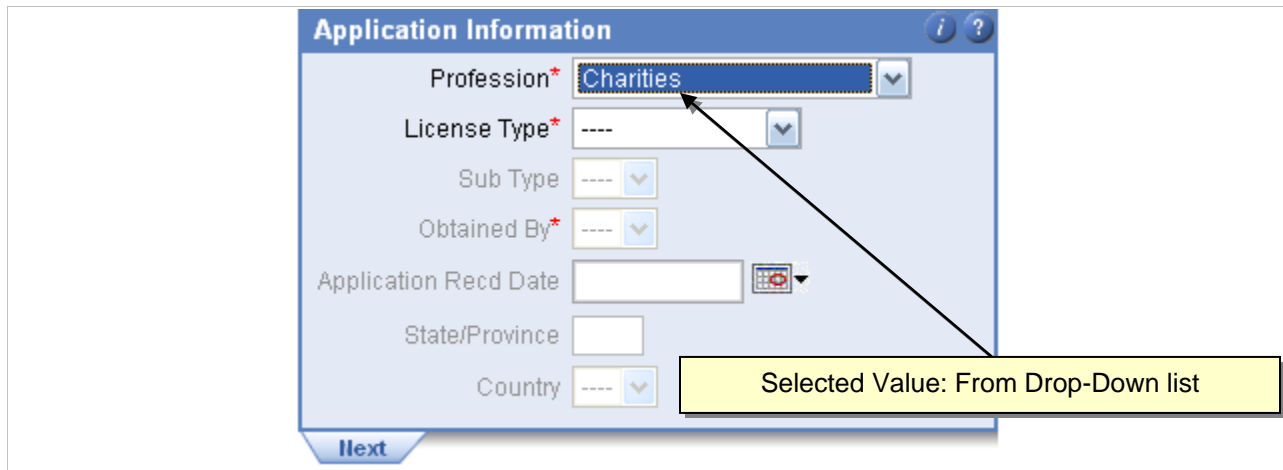


Figure I-30: Selected Profession Drop-Down List

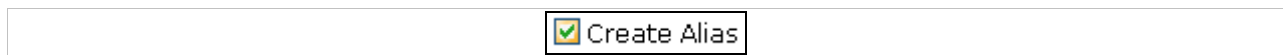


Figure I-31: Selected Checkbox

The screenshot shows a table titled 'Complaints' with columns: Complaint Number, Complaint Type, Status, Entered Date, Stage Date, and Public. The row for 'COM000014' is highlighted in yellow. A callout box labeled 'Selected Record: Indicated by Highlighting' points to this row. Below the table are buttons for 'New', 'Add', and 'Edit'.

Complaint Number	Complaint Type	Status	Entered Date	Stage Date	Public	
COM000014	Physical		07/16/2007	06/29/2007	No	
COM000027	Physical	Investigative Board	Entered	07/16/2007	07/16/2007	Yes

Figure I-32: Selected Record

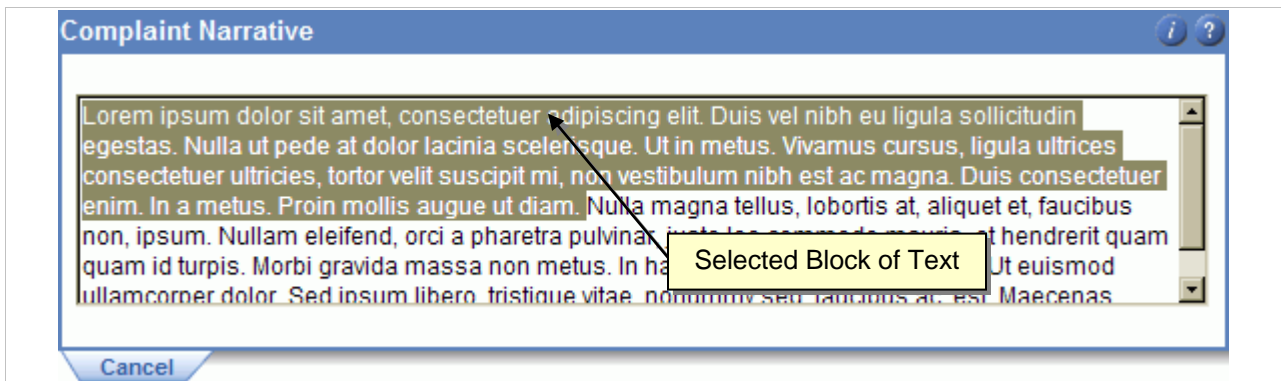


Figure I-33: Selected Text

Figure I-30, Figure I-31, Figure I-32 and Figure I-33 are examples of items that are selected.

Sort or Sorting: This term refers to arranging or ordering a list of records in a sequence and/or category. In the following example, a list of records resulting from a search, display different columns of data and demonstrates how they may be sorted. The data can be arranged by clicking on one of the column headers or sort keys. A list of objects is sorted in ascending order when it is sorted by lower values first. For example "1, 3, 5, 6, 7, 12, 100" is a list of numbers in ascending order, so is "Bob, John, Mary, Mike, Randy" or "01/01/2009, 02/01/2009, 03/01/2009" or, A to Z, 0 to 9. The reverse or descending order is sorted by higher values first. (Z to A, 9 to 0). For example, in [Figure I-34](#), the data set is sorted in ascending order by the last name of the persons who matched the search criteria.

Name	Address	License Type	License Number	Status
Brown, Joe	Columbia, MD - 21045	Detective		Denied
Brown, Joe	Columbia, MD - 21045	Detective		Pending
Carry, Harold	Columbia, MD - 21046	Desk Sergeant		Pending
Carry, Harold	Columbia, MD - 21046	Desk Sergeant		Active
Free, Sugar	Rockville, MD - 20852	Desk Sergeant		Pending
jesus, sweet	Silver Spring, MD - 20901			Pending
johansen, john	Columbia, MD - 21045			Pending
johansen, john	Columbia, MD - 21045	Desk Sergeant		Active
Jones, Jim	Columbia, MD - 21045	Patrol Officer		Pending
...

Figure I-34: Search Results

Clicking the **Status** column header will arrange or sort the results by that column. Clicking the **Status** column a second time will arrange or sort the results again by the same column in reverse order. See: [Figure I-35](#) and [Figure I-36](#) as examples.

Name	Address	License Type	License Number	Status
Carry, Harold	Columbia, MD - 21046	Desk Sergeant		Active
johansen, john	Columbia, MD - 21045	Desk Sergeant		Active
parnevick, jesper	Columbia, MD - 21045	Detective Junior Grade	045	Active
robards, ia		Patrol Officer	046	Active
Brown, Joe		Detective		Denied
jones, john	Jacksonville, FL - 32256	Detective		Denied
rakey, sally	Glen Burnie, MD - 21062	Detective		Denied
Brown, Joe	Columbia, MD - 21045	Detective		Pending
Carry, Harold	Columbia, MD - 21046	Desk Sergeant		Pending
Free, Sugar	Rockville, MD - 20852	Desk Sergeant		Pending

Figure I-35: Status: Sorted Ascending

Search Results				
Name	Address	License Type	License Number	Status
robards, james	Columbia, MD - 21045	Detective Junior Grade		Pending
Robards, James	Columbia, MD - 21045	Rookie		Pending
Parnevick, Jesper	Marriottsville, MD - 21104	Detective		Pending
Parnevick, Jesper	Marriottsville, MD - 21104	Desk Sergeant		Pending
lawrence, joey	Silver Spring, MD - 20907	Patrol Officer		Pending
jones,		Detective		Pending
Jones,		Patrol Officer		Pending
johansen, joni	Columbia, MD - 21045	Desk Sergeant		Pending
jesus, sweet	Silver Spring, MD - 20902	Rookie		Pending
Cruz, Susan	Rockville, MD - 20850	Desk Sergeant		Pending

Sorted by Status in Descending Order

Figure I-36: Status: Sorted Descending

Specialties: Is specialty information that is specific to a license record. Specialties are further designators for a license type, which also can have their own issue and expiration date. A license can have unlimited *Specialties*.

Status: Application, License: Licensing Agencies and Departments organize the licensing process into categories that meet their specific licensing procedures. Agencies define their own statuses, although they are based on one of four *Primary* statuses: **Active**, **Pending**, **Inactive**, and **Denied** which have specific meanings in the system. Subsets of the *Primary* status known as the *Secondary* status are created and associated with the Primary status. For example, an **Expired** license status will be interpreted by the system as **Inactive**.

When a license is being processed, for example, its status will be **Pending**. Other examples include **Suspended**, **Transfer Pending**, and **Lapsed**.

The default state of an application after it has been created is: **Pending**. Typically, statuses are color coded within the **Search Results** panel. See [Table I-1](#) and [Table I-2](#) for an explanation of the typical statuses that might be assigned to an application, license or renewal.

Primary Statuses	
Active	The application or renewal has been entirely completed and approved. The primary status of the license is updated to Active. The license is valid.
Denied	The application for license or license renewal has been denied. This can be because of a variety of situations or other grounds such as the requirements for a specific license type were not satisfied. As a result, the primary status of the license is set to Denied.
Inactive	
Pending	The application, license or renewal has been created, but is not yet completed. There are still requirements that need to be satisfied in order for the primary status to be changed. Typically, these requirements are a combination of fees and other conditions assigned to the license type.

Figure I-37: Primary License Status

Secondary Statuses	
Approved	The application, license or renewal has been entirely completed, and approved. The primary status is updated to active. The license is granted.
Complete	The application, license or renewal has been created, and all the necessary license requirements have been satisfied. Everything called for by the application process has been completed and entered, and now the application is awaiting a primary status change from pending to active.
Deleted	The license application or renewal had been successfully created, but a Delete transaction occurred. The application has been removed from the system.
Expired	The application, license or renewal had been approved, but past the expiration date for the license type. As a result, the primary status has been changed from pending or active to inactive.
Null and Void	A licensee can hold a succession of licenses. A license that is held prior to another license is the predecessor license, while the license that succeeds it is the successor license. For example, a Registered Nurse would be a predecessor to a Nurse Practitioner. When predecessors and successors are established, the system will automatically set the status of the predecessor license to Null and Void, once the successor license is issued. In the example, the RN license is Null and Void.
Reinstatement Pending	The license has expired. However, the licensee has reapplied for the license. If the license type is eligible for reinstatement, the license can be restored while keeping the same license number. This status indicates that the entire set of license requirements have not yet been satisfied in order for the primary status of Pending be changed.
Withdrawn	The application had been created, but a Withdraw transaction occurred perhaps because of inactivity. This status indicates that both the applicant and license record are saved in MyLicense® rather than deleted and that the license may be reapplied for in the future. NOTE: A withdrawal does not override the Deny status.

Figure I-38: Secondary License Status

Subtype (License): If a license type requires more than one definition, the subtype gives additional descriptive information. For example, a Commercial Accountant can have a subtype of taxation.

Teacher Highly Qualified: In accordance with criteria provided by The No Child Left Behind (NCLB) Act Of 2001, the Highly Qualified Teacher will have completed the usual or traditional process by which one obtains a license to teach through completion of a college or university teacher education program approved by the State Department of Education. Highly Qualified Teachers are teachers that are fully licensed, hold at least a Bachelor's degree, and are able to demonstrate subject matter competency in all core academic areas in which they are assigned.

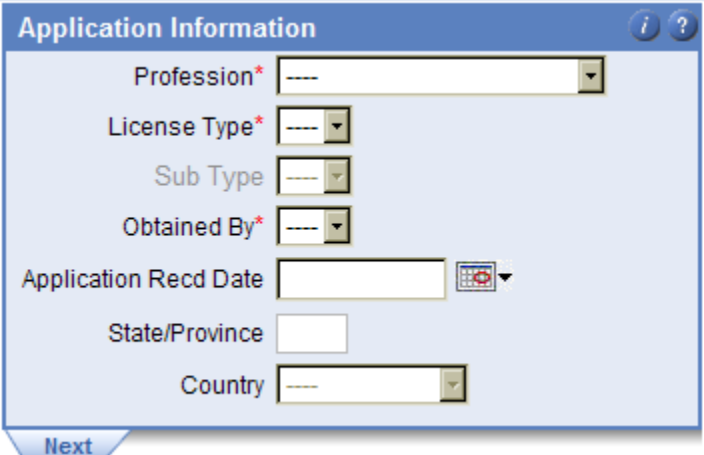
Temporary Licenses: Temporary licenses are issued to applicants or licensees to allow them to practice until a permanent license can be issued. Most often, these entities are awaiting transcripts or other requirements necessary for attaining permanent licensure.

Unallocate Payment: Dissociates fees that have been assigned to specific fee accounts. This process does not undo or cancel a payment received, but separates the payment from the account to which it was allocated. Payments can then be returned, refunded, or reallocated to another account.

Applicant: Create License Application

I. Create New Applicant

To create a new application for a license, Choose: **Applicant** > **Create** from the **Navigation** menu. The **Application Information** panel will be displayed.



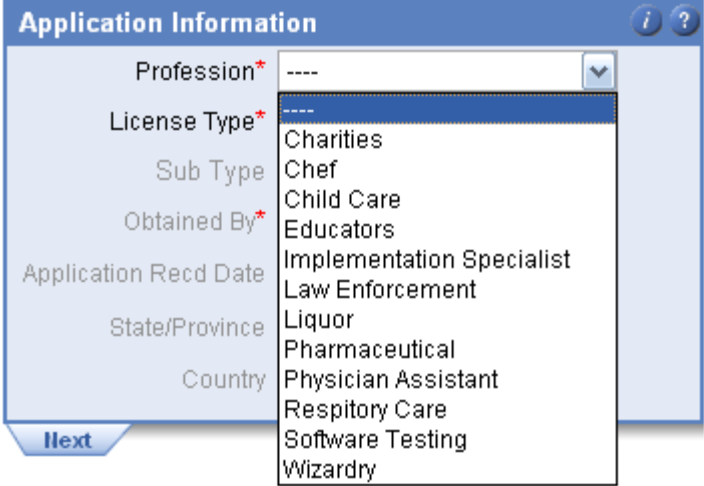
The screenshot shows the "Application Information" panel with the following fields:

- Profession* (dropdown menu)
- License Type* (dropdown menu)
- Sub Type (dropdown menu)
- Obtained By* (dropdown menu)
- Application Recd Date (text input with calendar icon)
- State/Province (text input)
- Country (dropdown menu)

A "Next" button is located at the bottom left of the panel.

Figure I-1: Application Information Panel - Create New License, Person

Select the profession from the **Profession** list as shown in [Figure I-2](#).



The screenshot shows the "Application Information" panel with the "Profession*" dropdown menu open, displaying a list of professions:

- Charities
- Chef
- Child Care
- Educators
- Implementation Specialist
- Law Enforcement
- Liquor
- Pharmaceutical
- Physician Assistant
- Respiratory Care
- Software Testing
- Wizardry

A "Next" button is located at the bottom left of the panel.

Figure I-2: Profession Selection - Create New License, Person

The **License Type** (* Required Field) drop-down box will be filtered according to the selected **Profession** (* Required Field). Select the **License Type** required.

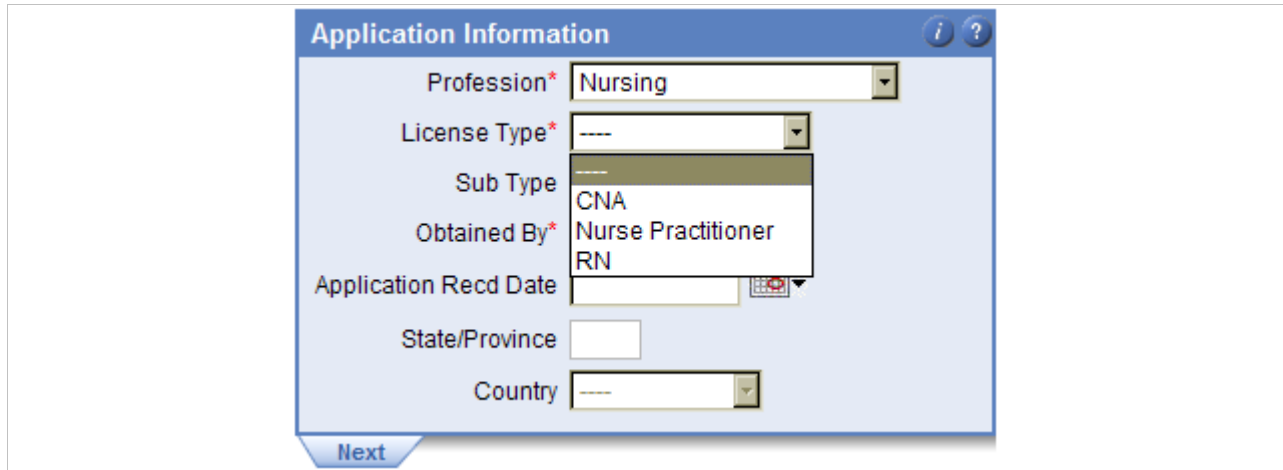


Figure I-3: License Type – Create New License, Person

If any sub types exist, the **Sub Type** will display the appropriate choices. If applicable, select a subtype. If not, tab to the **Obtained By** (* Required Field) drop-down list.

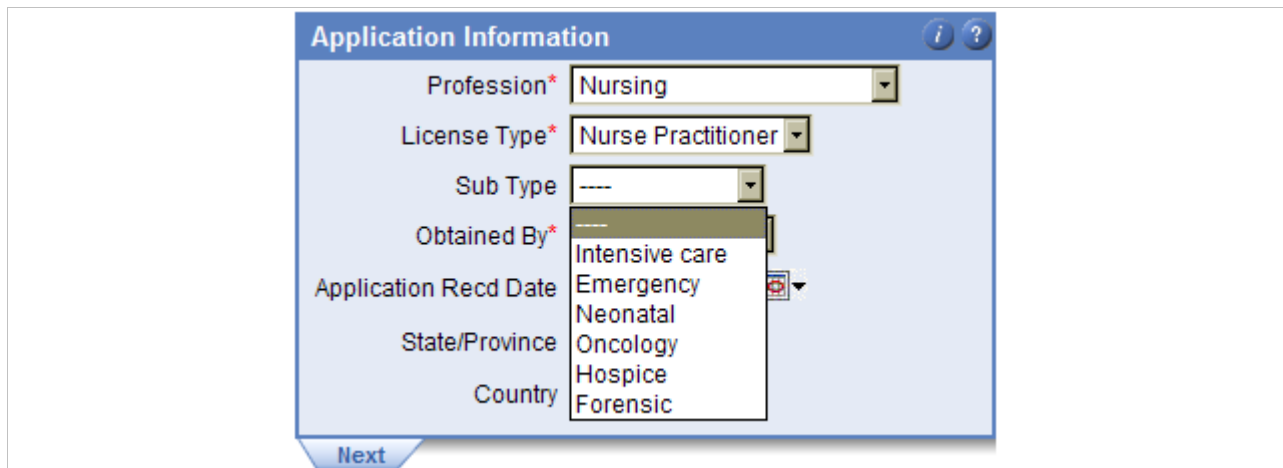


Figure I-4: Sub Type Selection – Create New License, Person

Sub Type refers to a subordinate or special type of license included within a more general license type.

Select the method by which the application is to be acquired using the **Obtained By** drop-down list. The values listed in **Obtained By** drop-down list are determined and filtered by a **License Type** and **Sub Type** if available. See: [Obtained By Method](#): in Guide to user Interface

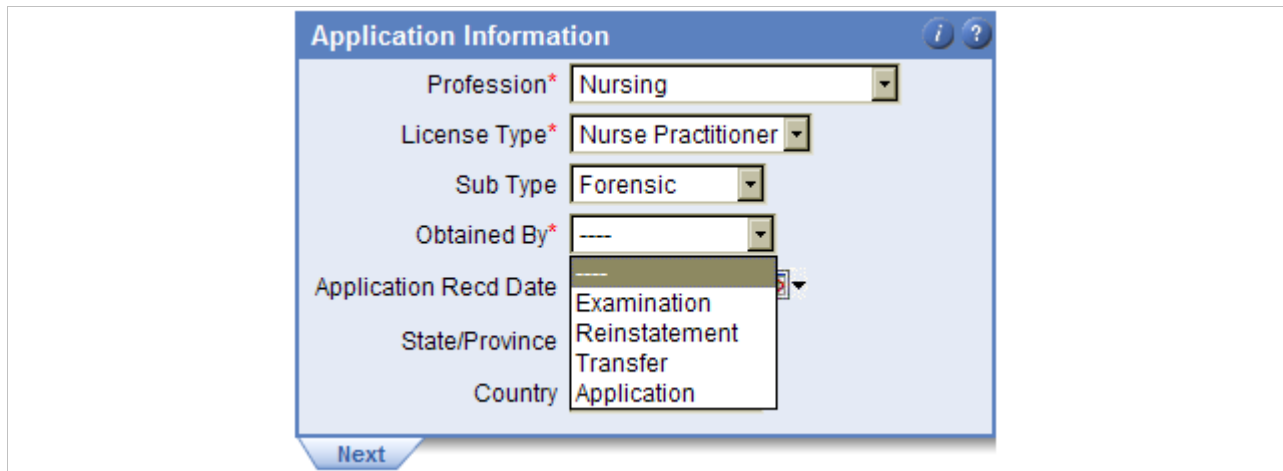


Figure I-5: Obtained By Method - Create New License, Person

The **Application Recd Date** is entered by selecting the date from the calendar control. For more information on how the calendar control functions, see: [Calendar Control](#) in: Guide to the User Interface.

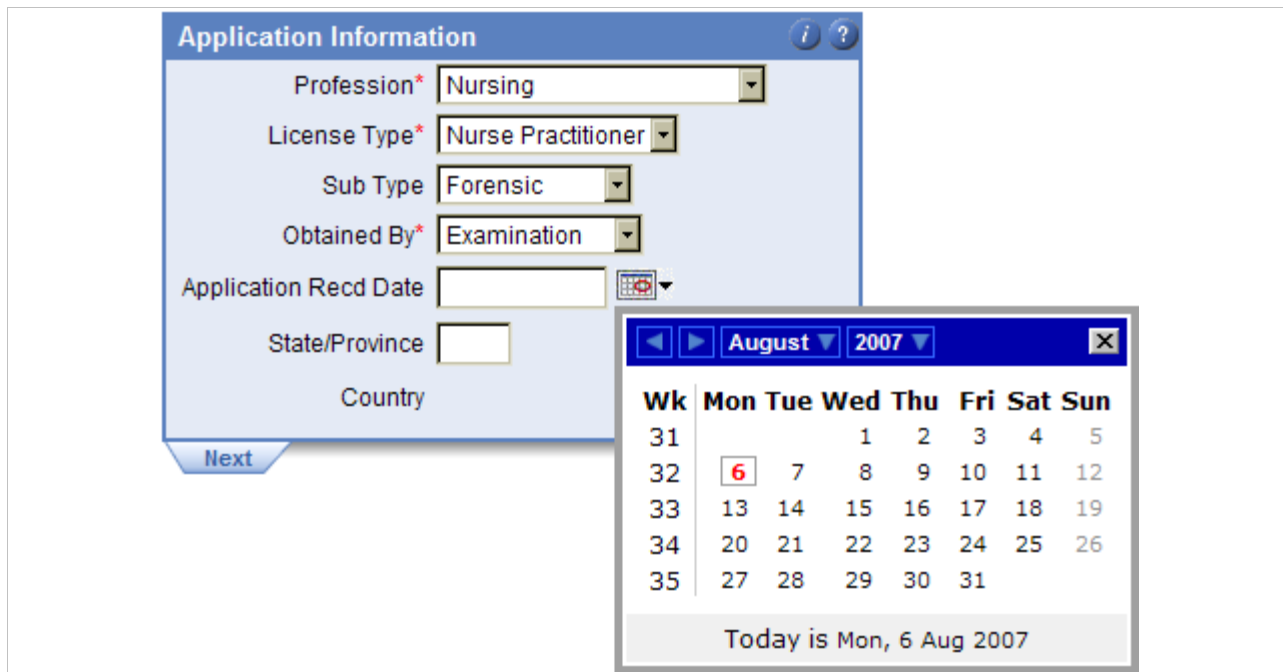


Figure I-6: Application Rec'd Date Selection - Create New License, Person

The **State/Province** can be filled in using the State or Province's letter codes. For example, enter in TN for Tennessee or CA for California. The Country drop-down list will automatically update to reflect the choice made in the **State/Province** text-box.



NOTE: The **State/Province** and **Country** fields are available on a filtered basis. Depending on which license type is chosen, these fields may be disabled or unavailable.

Figure I-7: State/Province - Create New License, Person

Select the country from the **Country** drop-down list.

Figure I-8: Country - Create New License, Person

Click the **Next** tab to continue.

Applicant Search

As part of the **New Applicant** procedure, the **Person** or **Facility** Search panels are used to locate individuals or business entities that currently exist in MyLicense Office[®] so that duplicate records are not created and entered into the system.

Depending on the license type selected, either the **Person Search** or **Facility Search** panel will be displayed.

The database is searched dependant upon the search criteria entered into the **Search** panel fields. If the applicant is found as a result of your search, the applicant record can be selected and processed accordingly. If the applicant does not exist in the database, a new application can be created for either a **Person** or a **Facility**. See: [Create New Applicant: Person](#) or [Create New Applicant: Facility](#).

The **Search** panel permits the ability to construct multiple-criteria searches using a combination of search parameters to refine and narrow the search for specific individuals, facilities and their license applications. [Table I-1](#) provides meaningful names and descriptions of the various **Search** panel fields, which are used as selection criteria when querying MyLicense[®] for an individual. Specifically, when the application's license type is designated that of a **Person** rather than a **Facility**.

For more information on how the MyLicense Office[®] search engine functions, see: [Search or Searching](#): in the Guide to the User Interface.

Applicant Create: Person Search – Parameters

Applicant Create: Person Search – Selection Parameters	
Address Line1:	Is the primary address information, usually a street address or P.O. Box. If the first line of the address is entered in this field, the search will be conducted for the first line of the address in accordance with the selected Address Type . Address Line1 data in combination with other search parameters will filter the result set to the chosen search criteria <i>AND</i> the first line of the address information entered in this text box. It is the first of four address lines that may be queried. By default, records are returned for the General Address Type .
Address Line2:	Is supplementary address information such as apartment number, P.O. Box number, lot number, rural delivery, and so forth. If the second line of the address is entered in this field, the search will be query for the second line of the address in accordance with the selected Address Type . Address Line2 in combination with other search parameters will return records for the selected search conditions <i>AND</i> the second line of the address entered in this text box. It is the second of four address lines that may be searched. By default, records are returned for the General Address Type .
Address Type:	Is a drop-down list that contains criteria for searching on address fields by a type of address such as the license address, general, physical, mailing, work etc. Selecting an Address Type from the alphabetized fixed list will return records of a specific type of address. Address Type in combination with other search parameters will narrow the result set to the chosen criteria <i>AND</i> the type of address selected from the Address Type drop-down list. NOTE: By default, General Address Type is selected.
City:	Is the city where the address is located. If the name of a city is entered in this field, the search will be conducted for the city in accordance with the selected Address Type . City data in combination with other search parameters will narrow the search results to the chosen criteria <i>AND</i> the city name entered in this text box. By default, records are returned for the General Address Type .

Applicant Create: Person Search – Selection Parameters	
DEA	Is the Drug Enforcement Agency number issued to the licensee. If known, enter the DEA number as a search criteria. Since the DEA number is unique to each licensee, no other search parameters are necessary.
Exclude Dependant Relationships:	If dependent, prerequisite or predicate license relationships exist for a particular license, the Exclude Dependant Relationships drop-down permits a search to exclude either All or None of required dependent license records from the search results. Specific predicate license relationships such as Attribute Of, Branch, Employer, Location, Supervisor, etc. are based on license type. When these license relationships are selected, the licenses are excluded from the result set.
First Name:	Is the first name of the applicant. If first name data is entered, the search will be conducted for the person's first name. The First Name in combination with other search parameters will narrow the result set to the chosen criteria <i>AND</i> the first name entered in the text box.
Last Name:	Is the last name of the applicant. If last name data is entered, the search will be conducted for the person's last name. The Last Name in combination with other search parameters will narrow the search results to the chosen criteria <i>AND</i> the last name entered in the text box.
License Number:	Is a unique license identifier assigned by the licensing agency to a license. If known, enter the license number as the search criteria. Since the license number is unique, no other search parameters are necessary.
License Status	Is the primary status of the application. Selecting a status from the alphabetized fixed list returns records of applications that match the selected application status. License Status in combination with other search parameters will narrow the result set to the chosen criteria <i>AND</i> the status selected from the License Status drop-down list.

Applicant Create: Person Search – Selection Parameters	
License Type:	Values of the License Type drop-down list are dependant on which profession is selected from the Profession drop-down list. Selecting a license type from the alphabetized fixed list returns records of a specific type of license. License Type in combination with other search parameters will narrow the search results to the chosen criteria <i>AND</i> the type selected from the License Type drop-down list.
Licensee Only:	The Licensee Only checkbox is selected by default when a profession is selected from the Profession drop-down list. This indicates that only individuals with pending or issued licenses in the selected profession will be displayed in the result set. No check here will result in a display of records within the selected profession, licensed or not.
Middle Name:	Is the applicant’s middle name. If middle name data is entered, the search will be conducted for the person's middle name. The Middle Name in combination with other search parameters will narrow the result set to the chosen criteria <i>AND</i> the middle name entered in the text box.
Profession:	Is a drop-down list in which the profession of the applicant may be selected. Selecting a profession from the alphabetized fixed list returns records of a specific profession. Profession in combination with other search parameters will narrow the search results to the chosen criteria <i>AND</i> the profession selected from the Profession drop-down list. NOTE: Only professions that the user has permissions to access will display and only those professions may be searched.
SSN :	Is the social security number of the applicant. If known, enter the SSN number as the search criteria. Since the SSN number is unique to each individual, no other search parameters are necessary.
State:	Is the state where the address is located. The drop-down list contains the two letter state codes. If a state is selected, the search will return records matching the chosen state in accordance with the selected Address Type . A State in combination with other search parameters will narrow the result set to the chosen criteria <i>AND</i> the selected state.

Applicant Create: Person Search – Selection Parameters	
Zip Code:	Is the zip code for the address locale. If a zip code is entered, the search will be conducted for records matching the zip code in accordance with the selected Address Type . The Zip Code in combination with other search parameters will narrow the search results to the chosen criteria <i>AND</i> the zip code entered in the text box.

Table I-1: Applicant Create: Person Search Panel - Parameters

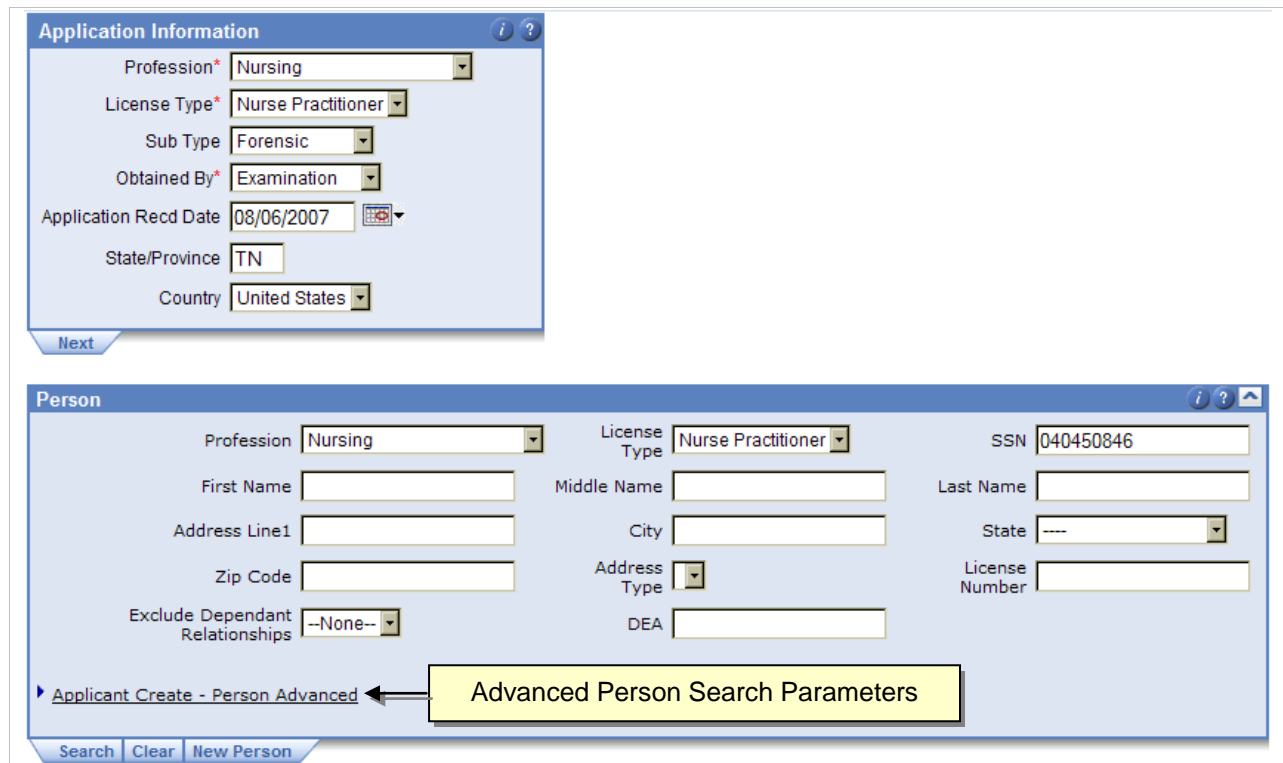


Figure I-9: Applicant Create: Person Search Panel

MyLicense Office[®] Search Engine supports several advanced operators, which further define search criteria when querying for specific **Person** records.

As illustrated in [Figure I-9](#), click the **Applicant Create – Person Advanced** link to display additional advanced search parameters. [Table I-2](#) provides meaningful names and descriptions of the various **Advanced Search** panel fields, which can also be used as selection criteria when querying MyLicense[®] for an individual.

Applicant Create: Person Advanced Search – Parameters

Applicant Create: Person Advanced: Search – Selection Parameters	
Alias	Is a pseudonym for another name. If a name or SSN change has occurred, an alias search may be selected by marking the Alias checkbox. The search will return records like the alias information entered into the SSN, first, middle and last name fields.
Applicant Number	Is a unique identifier that is automatically generated when a new applicant is created. If known, enter the Applicant Number as the search criteria. Since the Applicant Number is unique to each license application, no other search parameters are necessary.
Archive Only:	Select the Archive Only checkbox to conduct a search for license records that have been archived. The query will return records that match the selection parameters for records that have been archived.
County:	Is the state's county of a applicant's address. If the name of a county is entered in this field, the search will be conducted for records where the address in accordance with the selected Address Type , is within the county specified. County in combination with other selection parameters will refine the result set to the chosen criteria <i>AND</i> the county name entered in this text box.
Date of Birth:	Is the applicant's date of birth. If a Date of Birth is selected from the associated calendar control, the search will be conducted for records matching the birth date. Date of Birth in combination with other selection parameters will narrow the result set to the chosen criteria <i>AND</i> the Date of Birth .
DBA:	Is an abbreviation of 'Doing Business As'. For example, a company may be called 'ABC, Inc.' but operate their stores under '123 Supplies'. The DBA field could be used to search for '123 Supplies' even though the license is registered to 'ABC, Inc.' DBA in combination with other search parameters will refine the result set to the chosen criteria <i>AND</i> the DBA name entered in the text box.

Applicant Create: Person Advanced: Search – Selection Parameters	
Old Address Search	If the Old Address checkbox is selected, searches are fulfilled for previous addresses, which are stored in Address history. The query will return records that match the address information entered into one or more of the Address Lines , City , State , County , Zip Code and Phone Number fields.
Old License Number:	If known and stored within MyLicense Office®, a query can be executed for the applicant’s previous license information. The Old License Number is unique, so no other search conditions are necessary.
Phone Number:	If known, enter the applicant’s phone number as a search parameter. It is not necessary to format the phone number with dashes. The text box automatically formats U.S. phone numbers. Since a Phone Number is unique, no other selection criteria are necessary.
Renewal ID:	Is a unique identifier used to process a license renewal. If known, a search for licenses pending renewal may be performed by entering the Renewal ID number as a search parameter.
Soundex:	Selecting the Soundex checkbox enables queries for records that sound similar to the search criteria. For example, if users search for a licensee with the last name of 'JOHNSSON', and enter the search criteria as 'Johnson', MyLicense Office® will display all records that sound like Johnson, including JONSON, JONSSON etc.

Table I-2: Applicant Create: Person Advanced Search Panel - Parameters

Person

Profession License Type SSN

First Name Middle Name Last Name

Address Line1 City State

Zip Code Address Type License Number

Exclude Dependant Relationships

Advanced Person Search Fields

Applicant Create - Person Advanced

Old License Number Date Of Birth Applicant Number

Alias DBA County

Archive Only Soundex

Search Clear New Person

Figure I-10: Applicant Create: Person Advanced: Search Panel

Certain license types belong to legally recognized organizational entities rather than individuals. A practical example is that a business which must be licensed to provide goods and/or services to consumers, would apply for licensure and the license would ordinarily be issued to and belongs to the business entity which made application not an individual person.

When a new application is initiated for a business for which the license type belongs, MyLicense[®] will display the **Facility Search** panel. Like the **Person Search** panel, the **Facility Search** panel permits the ability to construct multiple-criteria searches using a combination of search parameters to refine and narrow the search for specific business entities and their license applications.

For more information on how the MyLicense Office[®] search engine functions, see: [Search or Searching](#) in the Guide to the User Interface.

[Table I-3](#) provides meaningful names and descriptions of the various **Search** panel fields, which are used as selection criteria when querying MyLicense[®] for a business entity. Specifically, when the application's license type is designated that of a **Facility** rather than a **Person**.

Applicant Create: Facility Search – Parameters

Applicant Create: Facility Search – Selection Parameters	
Address Line1:	<p>Is the primary address information, usually a street address or P.O. Box. If the first line of the address is entered in this field, the search will be conducted for the first line of the address in accordance with the selected Address Type. Address Line1 in combination with other search parameters will return records for the selected search conditions AND the first line of the address information entered in this text box. It is the first of four address lines that may be searched. By default, records are returned for the General Address Type.</p>
Address Line2:	<p>Is supplementary address information such as apartment number, P.O. Box number, lot number, rural delivery, and so forth. If the second line of the address is entered in this field, the search will be conducted for the second line of the address in accordance with the selected Address Type. Address Line2 data in combination with other search parameters will filter the search results to the chosen search criteria AND the second line of the address information entered in this text box. It is the second of four address lines that may be searched. By default, records are returned for the General Address Type.</p>

Applicant Create: Facility Search – Selection Parameters	
Address Type:	Is a drop-down list that contains criteria for searching on address fields by a type of address such as the license address, general, physical, mailing, work etc. Selecting an Address Type from the alphabetized fixed list will return records of a specific type of address. Address Type in combination with other search parameters will narrow the result set to the chosen criteria AND the type of address selected from the Address Type drop-down list. NOTE: By default, General Address Type is selected.
City:	Is the city where the address is located. If the name of a city is entered in this field, the search will be conducted for the city in accordance with the selected Address Type . City data in combination with other search parameters will narrow the search results to the chosen criteria AND the city name entered in this text box. By default, records are returned for the General Address Type .
DEA	Is the Drug Enforcement Agency number issued to the licensee. If known, enter the DEA number as a search criteria. Since the DEA number is unique to each licensee, no other search parameters are necessary.
Exclude Dependant Relationships:	If dependent, prerequisite or predicate license relationships exist for a particular license, the Exclude Dependant Relationships drop-down permits a search to exclude either All or None of required dependent license records from the search results. Specific predicate license relationships such as Attribute Of, Branch, Employer, Location, Supervisor, etc. are based on license type. When these license relationships are selected, the licenses are excluded from the result set.

Applicant Create: Facility Search – Selection Parameters	
FEIN:	Is the Federal Employer Identification Number generally assigned by the government to businesses. It is also known as an EIN (Employer Identification Number) or TIN (Tax Identification Number). Since the Federal ID number is unique to each business, no other search parameters are necessary.
Full Name:	Is the entire name of the facility. If the full name of a business entity is entered in this field, the search will be conducted for a matching name. Full Name in combination with other search parameters will narrow the result set to the chosen criteria AND the full name entered in this text box.
License Number:	Is a unique license identifier assigned by the licensing agency to a license. If known, enter the license number as the search criteria. Since the license number is unique, no other search parameters are necessary.
License Status	Is the primary status of the application. Selecting a status from the alphabetized fixed list returns records of applications that match the selected application status. License Status in combination with other search parameters will narrow the search results to the chosen criteria AND the status selected from the License Status drop-down list.
License Type:	Values of the License Type drop-down list are dependant on which profession is selected from the Profession drop-down list. Selecting a license type from the alphabetized fixed list returns records of a specific type of license. License Type in combination with other search parameters will narrow the result set to the chosen criteria AND the type selected from the License Type drop-down list.
Licensee Only:	The Licensee Only checkbox is selected by default when a profession is selected from the Profession drop-down list. This indicates that only facilities with pending or issued licenses in the selected profession will be displayed in the result set. No check here will result in a display of records within the selected profession, licensed or not.

Applicant Create: Facility Search – Selection Parameters	
Owner Name:	Is the name of the owner or manager of the facility. If the owner's or manager's name is entered in this field, the search will be conducted for facility records with a matching owner or manager Owner Name in combination with other search parameters will narrow the search results to the chosen criteria AND the Owner/Manager information entered in this text box.
Profession:	Is a drop-down list in which the profession of the applicant may be selected. Selecting a profession from the alphabetized fixed list returns records of a specific profession. Profession in combination with other search parameters will narrow the result set to the chosen criteria AND the profession selected from the Profession drop-down list. NOTE: Only professions that the user has permissions to access will display and only those professions may be searched.
State:	Is the state where the address is located. The drop-down list contains the two letter state codes. If a state is selected, the search will return records matching the chosen state in accordance with the selected Address Type . A State in combination with other search parameters will narrow the result set to the chosen criteria AND the selected state.
Zip Code:	Is the zip code for the address locale. If a zip code is entered, the search will be conducted for records matching the zip code in accordance with the selected Address Type . The Zip Code in combination with other search parameters will narrow the result set to the chosen criteria AND the zip code entered in the text box.

Table I-3: Applicant Create: Facility Search Panel - Parameters

Figure I-11: Applicant Create: Facility Search Panel

MyLicense Office[®] Search Engine supports several advanced operators, which further define search criteria when querying for specific **Facility** records.

Click the **Applicant Create – Facility Advanced** link to display additional search parameters. See:.

As illustrated in [Figure I-11](#), click the **Applicant Create – Facility Advanced** link to display additional advanced search parameters.

[Table I-4](#) provides meaningful names and descriptions of the various **Advanced Search** panel fields, which can also be used as selection criteria when querying MyLicense[®] for a **Facility**.

Applicant Create: Facility Advanced Search – Parameters

Applicant Create: Facility Advanced: Search – Selection Parameters	
Alias	Is a pseudonym for another name. If a facility has had a name change, an alias search may be selected by marking the Alias checkbox. The search will return records like the alias information entered into the Full Name field.
Applicant Number	Is a unique identifier that is automatically generated when a new applicant is created. If known, enter the Applicant Number as the search criteria. Since the Applicant Number is unique to each license application, no other selection parameters are necessary.
Archive Only:	Select the Archive Only checkbox to query for license records that have been archived. The query will return records that match the selection parameters for records that have been archived.
County:	Is the state's county of a applicant's address. If the name of a county is entered in this field, the search will be conducted for records where the address is within the county specified. County in combination with other search parameters will refine the result set to the chosen criteria <i>AND</i> the county name entered in this text box.
DBA:	Is an abbreviation of 'Doing Business As'. For example, a company may be called 'ABC, Inc.' but operate their stores under '123 Supplies'. The DBA field could be used to search for '123 Supplies' even though the license is registered to 'ABC, Inc.' DBA in combination with other search parameters will refine the result set to the chosen criteria <i>AND</i> the DBA name entered in the text box.
Officer First Name:	Is the first name of the CEO, president, treasurer, other titled officer of a corporation. However, it can mean any principal associated with a business. An individual may be a principal of many business entities so, Officer First Name in combination with other selection parameters will return records where Officer First Name <i>AND</i> the chosen criteria match.

Applicant Create: Facility Advanced: Search – Selection Parameters	
Officer Full Name:	Is the full name of an officer or principal associated with a facility. If the officer's full name is entered in this field, the search will be performed for the full name of the officer. Officer Full Name in combination with other search parameters will optimize the query for the selected search conditions <i>AND</i> the officer's full name.
Officer Last Name:	Is the last name of an officer or principal associated with a business entity. If the officer's last name is entered in this field, the search will be performed for the officer's last name. Officer Last Name in combination with other selection criteria will return records for the selected search conditions <i>AND</i> the Last Name of the officer.
Old Address Search	If the Old Address checkbox is selected, searches are fulfilled for previous addresses, which are stored in Address history. The query will return records that match the address information entered into one or more of the Address Lines , City , State , County , Zip Code and Phone Number fields.
Old License Number:	If known and stored within MyLicense Office®, a query can be executed for a previous license number issued to a facility. The Old License Number is unique, so no other selection parameters are necessary.
Phone Number:	If known, enter the applicant's phone number as a search parameter. It is not necessary to format the phone number with dashes. The text box automatically formats U.S. phone numbers. Since a Phone Number is unique, no other selection parameters are necessary.
Renewal ID:	Is a unique identifier used to process a license renewal. If known, a query for a license pending renewal may be performed by entering the Renewal ID as a search parameter.
Soundex:	Selecting the Soundex checkbox enables queries for records that sound similar to the search criteria. For example, if users search for a licensee with the last name of 'JOHNSSON', and enter the search criteria as 'Johnson', MyLicense Office® will display all records that sound like Johnson, including JONSON, JONSSON etc.

Table I-4: Applicant Create: Facility Advanced Search Panel - Parameters

Application Information

Profession* Community Residences
 License Type* Day Services
 Sub Type
 Obtained By* Application
 Application Recd Date 09/19/2007
 State/Province TN
 Country United States

Facility

Full Name
 Owner Name
 Address Line1
 Address Line2
 Address Line3
 Exclude Dependant Relationships --None--

Profession
 FEIN
 City
 Address Type General
 DEA

License Type
 Charter Number
 State
 License Number
 Zip Code

Advanced Facility Search Fields

Old License Number
 Applicant Number
 County
 DBA
 Alias
 Archive Only
 Soundex

Next | Search | Clear | New Facility

Figure I-12: Applicant Create: Facility Advanced Search Panel

Defining a query for applicant records can be extremely simple or very complex. If the search is based on one matching condition, such as "retrieve all applicants who live in Tennessee", only the **State** parameter would be selected to define the search. However, MyLicense[®] permits more complex searches using a combination of multiple search parameters to create very precise searches.

Figure I-13 is an example of a multiple criteria or a complex query using a combination of search parameters to query for a specific applicant.

The screenshot shows the 'Person' search panel in the MyLicense Office interface. A yellow box labeled 'Multiple Search Criteria' has arrows pointing to several fields: 'First Name' (containing 'James'), 'Last Name' (containing 'Hall'), 'State' (a dropdown menu set to 'Tennessee'), 'Date Of Birth' (containing '01/22/1965'), and 'Applicant Number'. Other visible fields include 'Profession', 'License Type', 'SSN', 'Middle Name', 'Address Line1', 'City', 'Address Type' (set to 'General'), 'DEA', 'Exclude Dependant Relationships' (set to '--None--'), 'Old License Number', 'Alias', 'Archive Only', 'DBA', 'Soundex', and 'County' (set to 'Shelby'). The 'Search' tab is highlighted at the bottom of the panel.

Figure I-13: Search Panel - Create New Applicant, Person

Once the preferred search parameters are entered in the appropriate fields, click the **Search** tab to submit the query. You can also submit the query by pressing the '**Enter**' key. For more information on querying, see: [Search or Searching](#) in the Guide to the User Interface.



NOTE: A wildcard search can be indicated in MyLicense Office[®] by an asterisk and will match one or more whole words. For Example: a search for [100*] in the address field will return results for all of the following (and more): 100 [NE Main Street](#) and 1000 [Forestview Place](#). Similarly, a search for [*burg] will return results for: [Gatlinburg](#), [Gaithersburg](#), and [Vicksburg](#). [*St*] returns: [1 Main St.](#), [NE Main Street](#) and [West State Blvd](#). While [P*bu*] returns [Platsburg](#), [Pittsburgh](#) and [Patricksburrough](#).



NOTE: Because MyLicense[®] defaults to the last search conducted, it may be necessary to click the **Clear** tab to remove any search parameters that may have been previously entered.

In response to executing a search by clicking the **Search** tab, MyLicense Office[®] produces a **Search Results** panel where a list of records that match the chosen criteria are displayed as in [Figure I-14](#).

[Table I-5](#) provides meaningful names and description of the columns displayed in the **Search Results** panel when a search has been executed for either a **Person** or a **Facility**.

In the event there is not a match, a new **Person** or **Facility** record may be created by clicking the respective **New Person** or **New Facility** tab on the **Search** panel.

Applicant Create: Search Results – Data Columns

Applicant Create: : Search Results – Data Columns	
Address:	This column displays the first line of the address, (usually the street or post office box) city, state and zip code for the applicant's General Address type. When address information for the license is collected, the first line of the address, city, state and zip code is also listed for the License Address type.
License Number:	This column displays the numeric or alphanumeric code that uniquely identifies the license within the issuing agency, department region or jurisdiction.
Name/License Type:	This column displays the applicant or licensee's complete name, which consists of the entire name of a business entity and in the case of an individual, it is a concatenation of the last name followed by the first name then the middle name and suffix.
Status:	The current secondary Status of the application or license is displayed in this column. For more information on statuses and their meanings, see: Status in Guide to the User Interface.

Table I-5: Applicant Create: Search Results Panel Columns

Name / License Type	Address	License Number	Status
Hall, James New Chef Type	Nashville TN 37250		Pending
Sous Chef		120	Pending
Liquor License		119	Pending
Hall, James Food Handler	Nashville TN 37250	121	Pending
Hall, James New Chef Type	Nashville TN 37250	CH030	Active
Hall, James	Nashville TN 37250		

Figure I-14: Applicant Create: Search Results

The results of the search can be sorted by clicking the column headers across the top of the panel: **Name**, **Address**, **License Type**, **License Number**, and **Status**. Click any column heading once to sort in ascending order. If a column header is clicked a second time, the order of the column is reversed.

For instance, if several results are found, and the **Status** column header is clicked, the **Search Results** panel may appear as it does in [Figure I-15](#). **Status** is sorted ascending.

Name	Address	License Type	License Number	Status
Coke, Sherry Diyet	Elkridge, MD - 21075	Sous Chef	026	Active
Davis, Dale	Washington, DC - 20019	Sous Chef	071	Active
Davis, Dale	Washington, DC - 20019	New Chef Type	CH007	Active
drew, jones	Columbia, MD - 21045	Sous Chef	069	Active
drew, jones	Columbia, MD - 21045	Sous Chef	069	Active
edison, thomas	Unknown, NA - 00000	Liquor License	049	Active
hilfigure, tommy	Columbia, MD - 21045	Sous Chef	067	Active
jill, jack	21045	Sous Chef	077	Active
jim, tony	Gaithersburg, MD - 20878	New Chef Type	CH008	Active
James, James F	Baltimore, MD - 21284	Food Handler	064	Active

Figure I-15: Search Results Sorted by Status Ascending

If the **Status** column header is clicked a second time, the data set will be sorted in descending order.

Name	Address	License Type	License Number	Status
Me, Test	Columbia, MD - 21046	New Chef Type		Withdrawn
Doe, John Bob	Springfield, MA - 01111	Food Handler	062	Withdrawn
Doe, John	Springfield, MA - 01111	Food Handler	059	Withdrawn
Smith, Bob	Silver Spring, MD - 20900	Food Handler	046	Reinstatement Pending
hilfigure, tommy	Columbia, MD - 21045	Sous Chef	067	Reinstatement Pending
hilfigure, tommy	Columbia, MD - 21045	Sous Chef	067	Reinstatement Pending
uncle, sam	21045	Sous Chef	078	Pending
testing, test	Washington, DC - 20019	Food Handler	054	Pending
Spade, Sam	Gaithersburg, MD - 20879	Sous Chef	060	Pending
Smith, William Smith	Manassas, VA - 20108	Food Handler	064	Pending

Figure I-16: Search Results Sorted by Status Descending

There may be several records displayed in the **Search Results** panel. Sorting the information by a column header may prove useful in finding and selecting the correct applicant record.



NOTE: The default sort order is by **Name** ascending.

Entering as much of the search criteria as possible will narrow the search displaying fewer applicant records in the result set displayed in the **Search Results** panel. With a smaller record set, it is easier to see if the applicant being searched for exists in the database.

Create New Applicant: Person

If the applicant is found as a result of the search, click on the **License** link [Figure I-17](#) for the desired applicant record and see: [Create New License for Existing Applicant or Licensee](#).

Otherwise, click the **New Person** tab or the **New Facility** tab depending on the license type. To create a new facility, see: [Create New Applicant: Facility](#).

To refine the applicant search or return to the **Search** panel to conduct a new search, click the **Clear** tab on the **Person Search** panel.

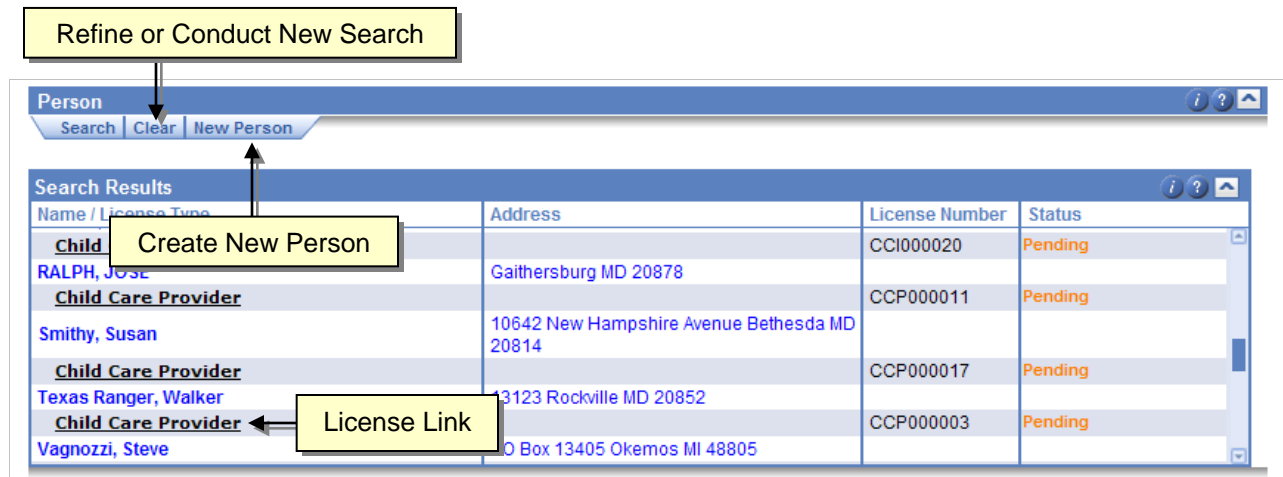


Figure I-17: Search Results Panel - Create New Applicant, Person

Demographic Information for New Applicant: Person

Enter all appropriate demographic data for the **New Person** application in the **Person Information**, **Person Additional** and **General Address** panels as shown in [Figure I-18](#).

Person Information i ?

Prefix <input type="text" value="Mr."/>	SSN <input type="text" value="040"/> - <input type="text" value="45"/> - <input type="text" value="0864"/>
First Name <input type="text" value="Steve"/>	Gender <input type="text" value="Male"/>
Middle Name <input type="text"/>	Place Of Birth <input type="text" value="Bay St, Louis, MS."/>
Last Name * <input type="text" value="Mitchell"/>	Date of Birth <input type="text" value="01/22/1965"/> <input type="button" value="Calendar"/>
Suffix <input type="text"/>	Date Deceased <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>

Person Additional i ?

Height <input type="text" value="510"/>	Weight <input type="text" value="165"/>
Citizenship Status <input type="text" value="United States"/>	Ethnicity <input type="text" value="Caucasian"/>
Home State <input type="text" value="Tennessee"/>	

General Address i ?

Addr Line 1 <input type="text" value="Bay of Naples"/> <input type="button" value="Map It"/>	Unlisted Address <input type="checkbox"/>
Addr Line 2 <input type="text"/>	
Addr Line 3 <input type="text"/>	
City <input type="text" value="Naples"/>	State <input type="text" value="ME"/> Zip Code * <input type="text" value="04055-"/>
Country <input type="text" value="United States"/>	County <input type="text" value="Cumberland"/>
Phone <input type="text"/>	Unlisted? <input type="checkbox"/>
Fax <input type="text"/>	Unlisted? <input type="checkbox"/>
Email <input type="text"/>	
Cell <input type="text"/>	

Create Alias

Figure I-18: New Person Panels – Create New Applicant



NOTE: First Name, Last Name, Addr Line 1 and Zip Code are required fields and must be completed to proceed.

Person Information

Enter the **First**, and **Last** name (* **Required Field**). You can also enter a prefix or title (e.g., Mr., Ms., or Dr.) in the **Prefix** field and any suffixes (for example, Jr., Sr., and III) in the **Suffix** field.



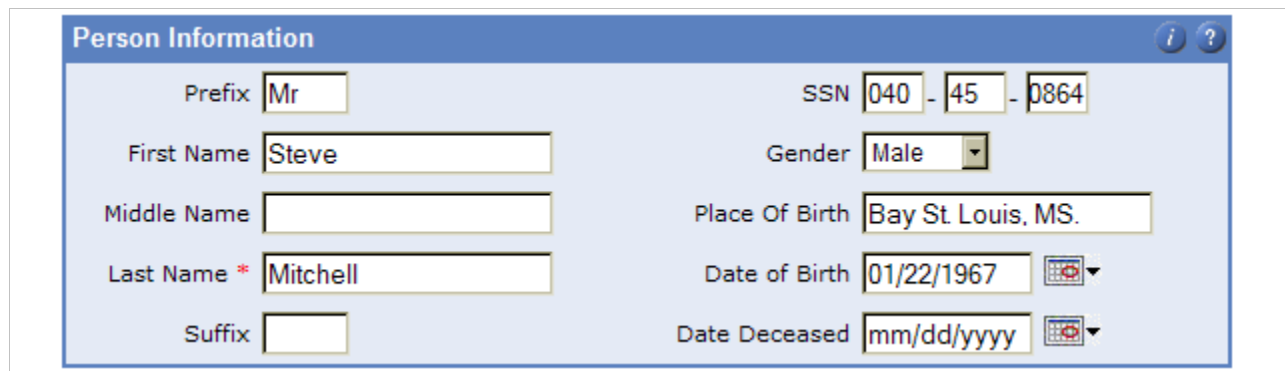
NOTE: Prefixes and suffixes must be entered in their designated fields to separate them from the first and last name.

Select the **Date of Birth** from the calendar control or type the date in MM/DD/YYYY format.

If known, **Date of Death** can be selected from the calendar control or type the date in MM/DD/YYYY format.

Select Male or Female from the **Gender** drop-down.

The **SSN** (Social Security Number) text-box will permit only numbers to be entered. Any text that is not a number will be deleted automatically.



The screenshot shows a 'Person Information' panel with the following fields and values:

Prefix	Mr	SSN	040 - 45 - 0864
First Name	Steve	Gender	Male
Middle Name		Place Of Birth	Bay St. Louis, MS.
Last Name *	Mitchell	Date of Birth	01/22/1967
Suffix		Date Deceased	mm/dd/yyyy

Figure I-19: Person Information Panel - Create New Applicant

Person Additional

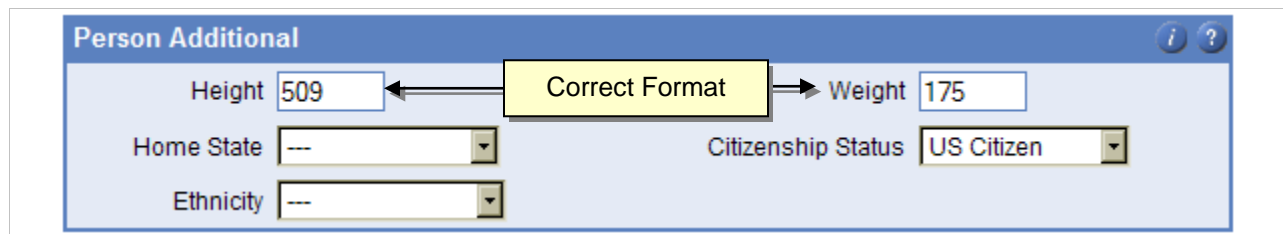
The **Height** text-field accepts whole numbers only. Entering a height such as 6'0" or 6.0 cannot be saved. Instead, **Height** should be entered as a 3-digit number. For example, to enter five-feet seven-inches, enter '507', or the total number of inches, such as 67".

The **Weight** text-box also accepts whole numbers only. Entering a weight of 175.2 will not save. Weight should be entered as a 3-digit number. For example, to enter one hundred twenty pounds, enter "120." To enter ninety pounds, enter "090."

Select the **Home State** from the drop-down list.

Select U.S. citizen, or other options, as appropriate from the **Citizenship Status** drop-down list.

Select a race/ethnicity from the **Ethnicity** drop-down list.



The screenshot shows a window titled "Person Additional" with a blue header bar. Inside the window, there are five input fields arranged in two rows. The first row contains "Height" with the value "509" and "Weight" with the value "175". The second row contains "Home State" with a dropdown arrow, "Ethnicity" with a dropdown arrow, and "Citizenship Status" with the value "US Citizen". A yellow callout box with the text "Correct Format" is positioned between the "Height" and "Weight" fields, with arrows pointing to both fields. The window also has information and help icons in the top right corner.

Figure I-20: Person Additional Panel - Create New Applicant

General Address

Enter the first line of the Applicant's address in the **Addr Line 1** text box. If necessary, use **Addr Line 2** and **Addr Line 3** to record additional address information.

Enter at least the first five numbers of a postal code in the **Zip Code (* Required Field)** text box. Click in the **State** text-box. If the zip code is valid, the **City**, **Country**, **County**, and **State** fields will automatically populate with the appropriate locale data for the zip code.

If the address is unlisted, mark the **Unlisted Address** checkbox.

The **Phone**, **Fax**, and **Cell** text-boxes will permit only numbers to be entered. Any other characters entered are automatically deleted. Only a ten-digit number may be entered; the telephone number is formatted automatically. If the number is an unlisted number, mark the **Unlisted?** checkbox.

Enter the applicant's **Email** address in the **Email** text box.

Click the **Map It** link to view a MapQuest map of the address.

Alias is a pseudonym for another name, assumed name or Social Security Number change. In the event the Applicant is also Known as a different name, changes their name or SSN, that data may be recorded by marking the **Alias** checkbox.

The screenshot shows the 'General Address' panel with the following fields and values:

- Addr Line 1: Naples Drive
- Addr Line 2: Suite 102
- Addr Line 3: Mail Stop 203
- City: Nashville
- State: TN
- Zip Code: 37250- (with a red asterisk indicating it is a required field)
- Country: United States
- County: Davidson
- Phone: (207) 555-1221
- Unlisted?:
- Fax: (empty)
- Unlisted?:
- Email: smitchell@sa.com
- Cell: (207) 555-2212

Annotations in the image include:

- A yellow box labeled 'Map It Link' with an arrow pointing to the 'Map It' link.
- A yellow box labeled 'Unlisted Address' with an arrow pointing to the 'Unlisted Address' checkbox.
- A yellow box labeled 'Alias' with an arrow pointing to the 'Create Alias' checkbox at the bottom.
- A yellow box labeled 'Zip Code Will Populate City, State, County and Country Fields' with an arrow pointing to the 'Zip Code' field.

Figure I-21 General Address Panel - Create New Applicant, Person

Person Information i ?

Prefix <input type="text" value="Mr"/>	SSN <input type="text" value="040"/> - <input type="text" value="45"/> - <input type="text" value="0864"/>
First Name <input type="text" value="Steve"/>	Gender <input type="text" value="Male"/>
Middle Name <input type="text"/>	Place Of Birth <input type="text" value="Bay St. Louis, MS."/>
Last Name * <input type="text" value="Mitchell"/>	Date of Birth <input type="text" value="01/22/1967"/> <input type="button" value="Calendar"/>
Suffix <input type="text"/>	Date Deceased <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>

Person Additional i ?

Height <input type="text" value="0"/>	Weight <input type="text" value="0"/>
Citizenship Status <input type="text" value="---"/>	Ethnicity <input type="text" value="---"/>
Home State <input type="text" value="---"/>	

General Address i ?

Addr Line 1 <input type="text" value="Naples Drive"/>	<input type="button" value="Map It"/>	Unlisted Address <input checked="" type="checkbox"/>
Addr Line 2 <input type="text" value="Suite 102"/>		
Addr Line 3 <input type="text" value="Mail Stop 203"/>		
City <input type="text" value="Nashville"/>	State <input type="text" value="TN"/>	Zip Code * <input type="text" value="37250-"/>
Country <input type="text" value="United States"/>	County <input type="text" value="Davidson"/>	
Phone <input type="text" value="(615) 642-8877"/>	Unlisted? <input type="checkbox"/>	
Fax <input type="text"/>	Unlisted? <input checked="" type="checkbox"/>	
Email <input type="text" value="smitchell@sa.com"/>		
Cell <input type="text" value="(423) 910-4020"/>		

Create Alias

Figure I-22: New Person Panels - Create New Applicant

Once all the desired data for the **New Person** application is entered in the appropriate fields for the **Person Information**, **Person Additional** and **General Address** panels as shown in [Figure I-22](#), click the **Next** button. Otherwise, click the **Back** button to return to the previous page.

The Person **Summary**, **License Information** and **Address Information** panels will be displayed as depicted in [Figure I-23](#). In the event it is necessary to correct any information listed on the Person **Summary** panel or return to previous pages, click the **Back** button.

The screenshot displays three main panels in a web application interface:

- Summary Panel:** A table with the following data:

Name	Address	License Type	License Number	License Status
Steve Mitchell	Naples Drive Suite 102 Mail Stop 203 Nashville TN 37250		N/A	N/A
- License Information Panel:** Contains a 'DBA' text input field and a yellow 'Doing Business As' button. An arrow points from the button to the input field.
- Address Information Panel:** Contains various input fields:
 - Addr Line 1, 2, 3 (text boxes)
 - City (dropdown), State (text), Zip Code * (text)
 - Country (dropdown: United States), County (dropdown), Jurisdiction (dropdown)
 - Phone, Fax (text boxes) with 'Unlisted?' checkboxes
 - Email, Cell (text boxes)
 - Select Email (dropdown: Other), Mailing Address (checkbox)
 - Email Merge Address (text box)

At the bottom of the form are 'Copy General Address', 'Copy Prereq Address', 'Finish', and 'Back' buttons.

Figure I-23: License and Address Information - Create New Applicant, Person

A **DBA** (short for "doing business as"), fictitious business name or assumed name permits the applicant or other entity to do business as a particular name, which may be recorded in the **DBA** text box, provided in the **License Information** panel shown in [Figure I-23](#).

The address information entered in the **Address Information** panel shown in [Figure I-24](#) is the Address of Record or the address information for the license (not the Person).

If the address for the license itself or the Address of Record is different from the **General Address**, complete all the appropriate address information fields. If the address is the same as the Person's general address, click the **Copy General Address** tab on the **Address Information** panel. The general address data previously recorded will populate the **Address Information** panel fields. Once the address fields are populated, address data may be altered or additional address information added.

The screenshot shows the 'Address Information' panel with the following fields and values:

- Addr Line 1: 10 Capital Ave
- Addr Line 2: (empty)
- Addr Line 3: (empty)
- City: Nashville
- State: TN
- Zip Code *: 37222-
- Country: United States
- County: Davidson
- Jurisdiction: Enforcement 1
- Phone: (615) 543-3214
- Fax: (615) 543-3213
- Email: (empty)
- Cell: (615) 902-3215
- Select Email: Other
- Email Merge Address: (empty)

Checkboxes: Unlisted Address (checked), Mailing Address (unchecked). Unlisted? checkboxes for Phone and Fax are also present.

Buttons: Map It, Copy General Address, Copy Prereq Address.

Figure I-24: Address Information - Create New Applicant, Person

Mark the **Mailing Address** checkbox to indicate this is the correct mailing address.

The **Email Merge Address** field permits MyLicense Office[®] data to be merged into standard documents that is then created in an Email message. The **Email** merge feature can be used when sending notifications such as renewal notices, changes in status, disciplinary actions, inspections, fees, audits, regulatory information and other correspondence having an effect on licensure.

The **Jurisdiction** drop-down contains values that represent the various authorities or geographic area over which authority extends that may administer or otherwise have legal or oversight capacity concerning the license.

Clicking the **Copy Prereq** tab will populate the **Address Information** panel fields with the license address of a prerequisite license. See: in the Guide to the User Interface.

Click the **Finish** button when the **License Information** and **Address Information** panels are completed. To discard and return to the previous page, click the **Back** button.

The page is refreshed to the **Applicant: Edit** page where the newly created **Person** and **License** application is displayed and selected in the **Search Results** panel.

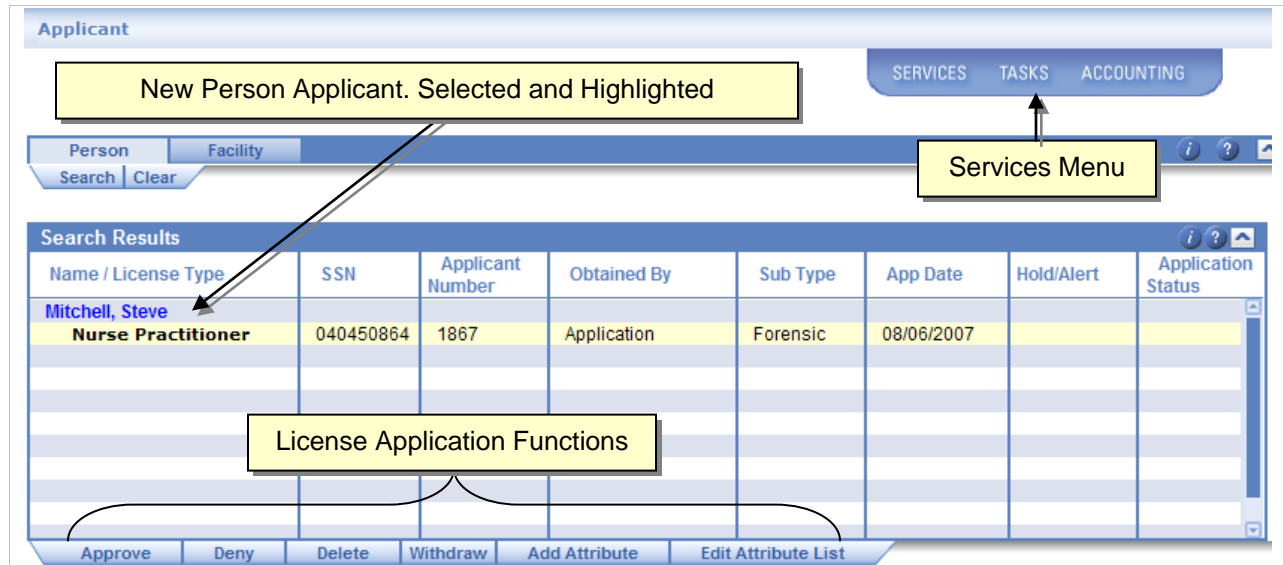


Figure I-25: Search Results, Selected License - Create New Applicant, Person

On the **Applicant Edit** page, the user will have a variety of options to continue to process the application and insert new, edit or delete relevant data as it pertains to the applicant and license.

The **Search Results** panel displays tabs that function to deny the application see: [Deny License Application](#). To delete the application see: [Delete License Application](#). To withdraw the application, see: [Withdraw License Application](#). To add attributes to the license see: [Add License Attribute](#) and to edit the attribute list values see: [View License Attribute List](#).

The **Services: Tasks** and **Accounting** menu options are made available. See: [Appendix B Tasks Menu](#). For information on how to use the [Tasks: Services Menu](#), [Tasks: Tasks Menu](#), or [Tasks: Accounting Menu](#) menus and options, see: [Appendix B Tasks Menu](#).

Depending on the profession and the license type, some of the **Mini-panels** listed in [Table I-6](#): will appear on the **Applicant Edit** page below the **Search Results** panel. In addition, other *User Defined Objects* configured by System Administrators may also be displayed.

Mini-Panels – New Applicant: Person			
Alias	Document	Education	Employer
Employment	Exam.	Inspection	License
License Bond	License CSR	Person	Prerequisites
Previous Licenses	Specialties	Requirements	Teacher Highly Qualified
User Defined Objects			

Table I-6: Create New Applicant: Person Mini-panels

To add new, view, edit or otherwise manage other details about the new applicant and license, click on the **Details** button of the relevant **Mini-panels** displayed below the **Search Results** panel. For more information on **Mini-panels**, see: [Appendix A – Mini-panels](#).

See: [Complete New Applicant and License Application](#) to complete the application.



NOTE: Depending on your present configuration of MyLicense Office[®], some data elements or objects displayed on the various “**Create New Person**” panels may or may not be exposed. See your System Administrator.

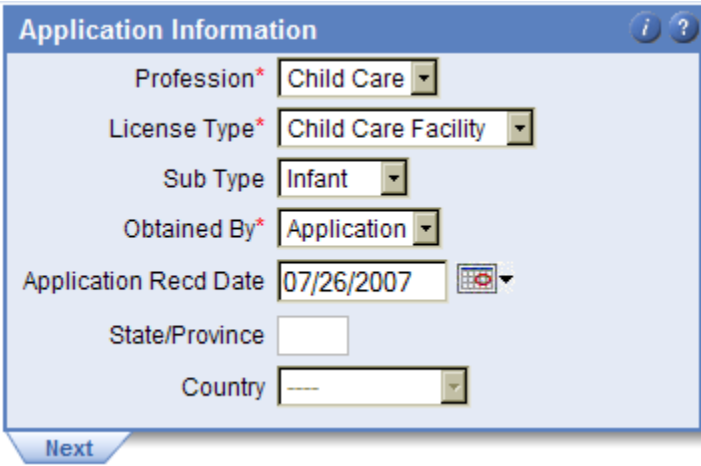
Create New Applicant: Facility

Creating a new facility and license application begins with the same steps outlined in the procedure for creating: [Create New Applicant](#).

Choose **Applicant > Create** from the **Navigation** menu.

Complete the **Application Information** panel. See: [Create New Applicant](#).

Like a new person application, the ability to create a new facility is based on license type. That is, only certain license types belong to either a facility or person application.



The screenshot shows a dialog box titled "Application Information" with a blue header and a light blue background. It contains several fields for data entry:

- Profession***: A dropdown menu with "Child Care" selected.
- License Type***: A dropdown menu with "Child Care Facility" selected.
- Sub Type**: A dropdown menu with "Infant" selected.
- Obtained By***: A dropdown menu with "Application" selected.
- Application Recd Date**: A text box containing "07/26/2007" and a calendar icon to its right.
- State/Province**: An empty text box.
- Country**: A dropdown menu with a blank space selected.

At the bottom left of the dialog box is a blue button labeled "Next".

Figure I-26: Application Information Panel - Create License, Facility

Select the **Profession** (* **Required Field**) and a **Sub Type** if necessary from the drop-down lists.

Select the **Obtained By** method (* **Required Field**), and **Application Recd Date**.

Select the **State/Province** the **Country** field will automatically populate based on the State/Province entry.

Click the **Next** tab once the appropriate Application Information data has been entered.

The **Facility Search** panel will be displayed.

As part of the "New Applicant" process, the **Facility Search** panel is used to locate existing facilities in MyLicense Office[®] so that duplicate records are not entered into the system.

The database is searched dependant upon the search criteria entered. If the applicant already exists, the applicant can be selected and processed accordingly. If the applicant does not exist in the database, a new application can be created for facility.

Enter in any criteria known to narrow the results. Click the **Search** tab. See: [Applicant Search](#).

The screenshot shows the 'Facility' search panel with the following fields and controls:

- Profession: [---] (dropdown)
- License Type: [---] (dropdown)
- Address Line1: [] (text)
- Zip Code: [] (text)
- DEA: [] (text)
- Full Name: [] (text)
- License Number: [] (text)
- City: [] (text)
- Owner Name: [] (text)
- Exclude Dependant Relationships: [--None--] (dropdown)
- FEIN: [] (text)
- Address Type: [] (dropdown)
- State: [---] (dropdown)
- Charter Number: [] (text)
- County: [] (text)
- Applicant Number: [] (text)
- Old License Number: [] (text)
- DBA: [] (text)
- Soundex:
- Alias:
- Archive Only:
- Non Licensee Only:

At the bottom, there are three tabs: **Search**, **Clear**, and **New Facility**. A yellow box labeled 'Advanced Search Parameters' has an arrow pointing to the 'Applicant Create - Facility Advanced' link.

Figure I-27: Search Panel - Create New Applicant, Facility

If the applicant is found as a result of the search, click on the **License** link to select the preferred applicant record and see: [Create New License for Existing Applicant or Licensee](#).

To refine the applicant search or return to the **Search** panel to conduct a new facilities search, click the **Clear** tab on the **Facility Search** panel.

Otherwise, click the **New Facility** tab

Click the **New Facility** tab on the **Search Results** panel to begin creating a new facility and license application. The **Facility**, **Facility Additional** and **General Address Panels** will be displayed as shown in [Figure I-28](#).

Demographic Information for New Applicant: Facility

Enter all appropriate demographic data for the **New Facility** application in the **Facility Information**, **Facility Additional** and **General Address** panels as shown in [Figure I-28](#).

Facility i ?

Full Name *

Owner/Manager

Registration Date

Facility Additional i ?

Federal Id Ownership Type

Charter Number Home State

Retail Merchant Id

General Address i ?

Addr Line 1 [Map It](#) Unlisted Address

Addr Line 2

Addr Line 3

City State Zip Code *

Country County

Phone Unlisted?

Fax Unlisted?

Email

Cell

Create Alias

Figure I-28: New Facility Panels - Create New Applicant. Facility



NOTE: Full Name and Zip Code are required fields and must be completed to proceed.

Facility Information

Enter in the full facility name in the **Full Name** (* **Required Field**) text-box. The facility should be the same as the one entered in the **Search** panel.

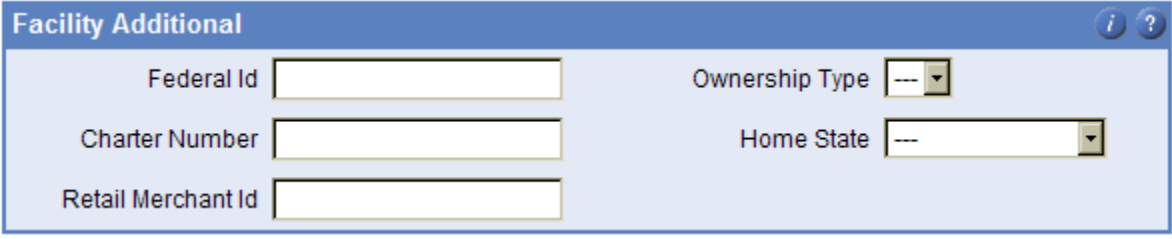
If known, enter the **Owner/Manager** name in the text box provided.

Registration Date usually refers to an incorporation date or the date the facility registered with the state to do business however, it can mean any other date the user would want to store. Select the **Registration Date** from the calendar control or type the date in MM/DD/YYYY format.

Figure I-29: Facility Information Panel - Create New Applicant, Facility Additional

Facility Additional	
Charter Number:	Is typically a unique and constant identifier assigned by the state’s Secretary of States office for each entity that may have registered or incorporated to do business within that state. Like the Registration Date, it can mean any thing else the user may want to record.
Federal ID:	Is the Federal Employer Identification Number, which is the corporate equivalent to a Social Security Number. If known, that data may be recorded in the text–box provided.
Home State:	Is the facility’s domiciled state or state of origin.
Ownership Type:	Is the nature of facility’s business; e.g., corporation, partnership, sole proprietorship. If desired, select the appropriate choice from the drop–down list.
Retail Merchant ID:	Is a number provided to a merchant by a credit card processor when that merchant retains the services of that processor. This data can be recorded in the text box provided.

Table I-7: Facility Additional – Data Elements



The screenshot shows a web form titled "Facility Additional". It contains the following fields:

- Federal Id: Text input box
- Charter Number: Text input box
- Retail Merchant Id: Text input box
- Ownership Type: Dropdown menu
- Home State: Dropdown menu

Figure I-30: Facility Additional Panel - Create New Applicant, Facility

Enter all known or pertinent data in the text boxes provide on the **Facility Additional** panel.

General Address

For facilities, two addresses must be entered: one on the **General Address** panel as shown in [Figure I-31](#) and one on the **Address Information** panel as shown in [Figure I-32](#). This allows facilities, many of which have more than one location, to maintain an address for their headquarters, as well as one for the current location that is seeking licensure. Either one of these addresses can be designated as the address of record or default mailing address.

Enter the first line of the Applicant's address in the **Addr Line 1** text box. If necessary, use **Addr Line 2** and **Addr Line 3** to record additional address information.

Enter at least the first five numbers of a postal code in the **Zip Code (* Required Field)** text box. Click in the **State** text-box. If the zip code is valid, the **City**, **Country**, **County**, and **State** fields will automatically populate with the appropriate locale data for the zip code.

If the address is unlisted, mark the **Unlisted Address** checkbox.

The **Phone**, **Fax**, and **Cell** text-boxes will permit only numbers to be entered. Any other characters entered are automatically deleted. Only a ten-digit number may be entered; the telephone number is formatted automatically. If the number is an unlisted number, mark the **Unlisted?** checkbox.

Enter the applicant's **Email** address in the **Email** text box.

Click the **Map It** link to view a MapQuest map of the address.

Alias is a pseudonym for another name, assumed name or Social Security Number change. In the event the Applicant is also Known as a different name, changes their name or SSN, that data may be recorded by marking the **Alias** checkbox.

General Address

Addr Line 1: 1 Sutton Park [Map It](#) Unlisted Address:

Addr Line 2: Suite 302

Addr Line 3:

City: Nashville State: TN Zip Code: *37201-

Country: United States County: Davidson

Phone: (615) 345-4534 Unlisted?:

Fax: (615) 345-4535 Unlisted?:

Email: Info@TinyTots.com

Cell: (615) 345-4535

Create Alias

Next Back

Figure I-31: General Address Panel - C Create New Applicant, Facility

Once all desired Facility demographic data is entered in the appropriate fields for the **Facility Information**, **Facility Additional** and **General Address** panels as shown in [Figure I-31](#), click the **Next** button to navigate to the **License Information** page.

The facility **Summary**, **License Information** and **Address Information** panels will be displayed as depicted in [Figure I-32](#). In the event it is necessary to correct any information listed on the facility **Summary** panel or return to previous pages, click the **Back** button.

Summary				
Name	Address	License Type	License Number	License Status
Tiny Tot's Day Care	1 Sutton Park Suite 302 Nashville TN 37201		N/A	N/A

License Information	
DBA	Doing Business As

Address Information		
Addr Line 1	<input type="text"/>	<input type="checkbox"/> Map It
Addr Line 2	<input type="text"/>	
Addr Line 3	<input type="text"/>	
City	<input type="text"/>	Unlisted Address <input type="checkbox"/>
State	<input type="text"/>	
Country	United States	Zip Code * <input type="text"/>
County	<input type="text"/>	Jurisdiction <input type="text"/>
Phone	<input type="text"/>	Unlisted? <input type="checkbox"/>
Fax	<input type="text"/>	Unlisted? <input type="checkbox"/>
Email	<input type="text"/>	
Cell	<input type="text"/>	
Select Email	Other	Mailing Address <input type="checkbox"/>
Email Merge Address	<input type="text"/>	

Copy General Address Copy Prereq Address

Finish Back

Figure I-32: License and Address Information - Create New Applicant, Facility

A **DBA** (short for "doing business as"), fictitious business name or assumed name permits the facility or other entity to do business as a particular name, which may be recorded in the **DBA** text box, provided in the **License Information** panel shown in [Figure I-32](#).

The address information entered in the **Address Information** panel shown in [Figure I-33](#) is the Address of Record or the address information for the license (not the facility).

If the address for the license itself or the Address of Record is different from the **General Address**, complete all the appropriate address information fields. If the address is the same as the facility's general address, click the **Copy General Address** tab on the **Address Information** panel. The general address data previously recorded will populate the **Address Information** panel fields. Once populated, address data may be altered or additional address data added.

The screenshot shows the 'Address Information' panel with the following fields and values:

- Addr Line 1: 10 Capital Ave
- Addr Line 2: (empty)
- Addr Line 3: (empty)
- City: Nashville
- State: TN
- Zip Code *: 37222-
- Country: United States
- County: Davidson
- Jurisdiction: Enforcement 1
- Phone: (615) 543-3214
- Fax: (615) 543-3213
- Email: (empty)
- Cell: (615) 902-3215
- Select Email: Other
- Email Merge Address: (empty)

Additional features include a 'Map It' button, an 'Unlisted Address' checkbox (checked), 'Unlisted?' checkboxes for Phone and Fax (Phone is unchecked, Fax is checked), and a 'Mailing Address' checkbox (unchecked). At the bottom, there are two tabs: 'Copy General Address' and 'Copy Prereq Address'.

Figure I-33: Address Information - Create New Applicant, Facility

Mark the **Mailing Address** checkbox to indicate this is the correct mailing address.

The **Email Merge Address** field permits MyLicense Office[®] data to be merged into a standard documents that is then created in an Email message. The Email merge feature can be used when sending notifications such as renewal notices, changes in status, disciplinary actions, inspections, fees, audits, regulatory information and other correspondence having an effect on licensure.

The **Jurisdiction** drop-down contains values that represent the various authorities or geographic area over which authority extends that may administer or otherwise have legal or oversight capacity concerning the license.

Clicking the **Copy Prereq** tab will populate the **Address Information** panel fields with the license address of a prerequisite license. See: [Prerequisites](#) in Appendix A

Click the **Finish** button when the **License Information** and **Address Information** panels are completed. To discard and return to the previous page, click the **Back** button.

The page is refreshed to the **Applicant: Edit** page where the newly created **Facility** and **License** application is displayed and selected in the **Search Results** panel.

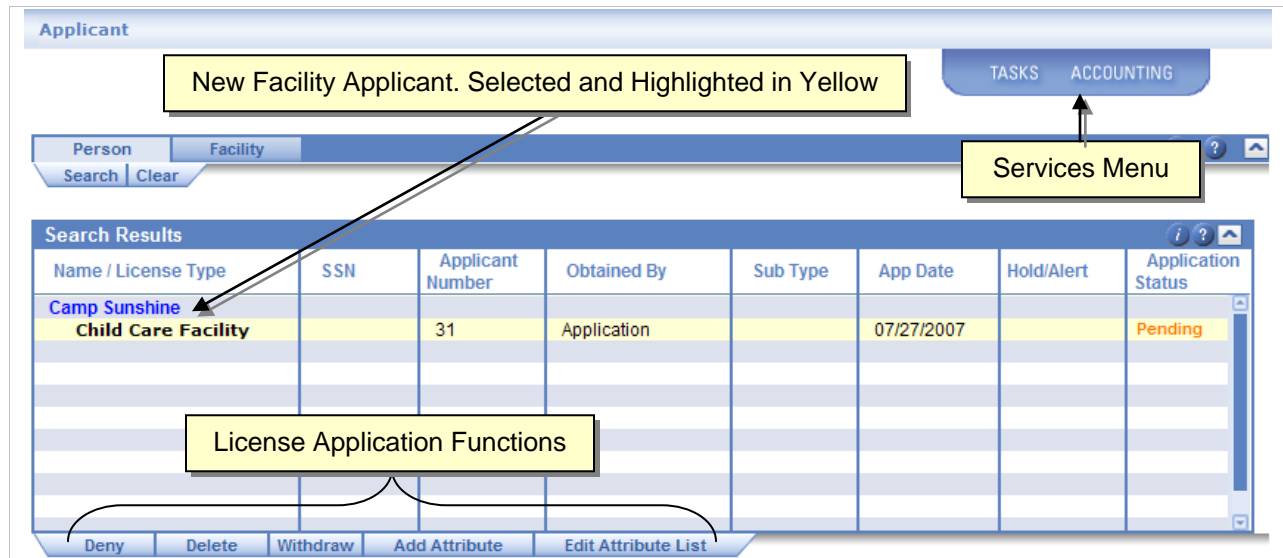


Figure I-34: Search Results, Selected License - Create New Applicant, Facility

On the **Applicant Edit** page, the user will have a variety of options to continue to process the facility application and add new, edit or delete relevant data as it pertains to the applicant and license.

The **Search Results** panel displays tabs that function to deny the application see: [Deny License Application](#). To delete the application see: [Delete License Application](#). To withdraw the application, see: [Withdraw License Application](#). To add attributes to the license see: [Add License Attribute](#) and to edit the attribute list values see: [View License Attribute List](#).

The **Services: Tasks** and **Accounting** menu options are made available. See: [Appendix B Tasks Menu](#). For information on how to use the [Tasks: Services Menu](#), [Tasks: Tasks Menu](#), or [Tasks: Accounting Menu](#) menus and options, see: [Appendix B Tasks Menu](#).

Depending on the profession and the license type, some of the **Mini-panels** listed in [Table I-8](#): will appear on the **Applicant Edit** page below the **Search Results** panel. In addition, other *User Defined Objects* configured by System Administrators may also be displayed.

Mini-Panels – New Applicant: Facility			
Alias	Corporation Merger	Corporation Personnel	Document.
Education	Employer	Employment	Exam
Facility	Inspection	License	License Bond
License CSR	Prerequisites	Previous Licenses	Requirements
Specialties	User Defined Objects		

Table I-8: Create New Applicant: Facility Mini-panels

To add new, view, edit or otherwise manage other details about the new applicant and license, click on the **Details** button of the relevant **Mini-panels** displayed below the **Search Results** panel. For more information on **Mini-panels**, see: [Appendix A – Mini-panels](#).

See: [Complete New Applicant and License Application](#) to complete the application



NOTE: Depending on your present configuration of MyLicense Office[®], some data elements or objects displayed on the various **Create New Facility** panels may or may not be exposed. See your System Administrator.

Create New License for Existing Applicant or Licensee

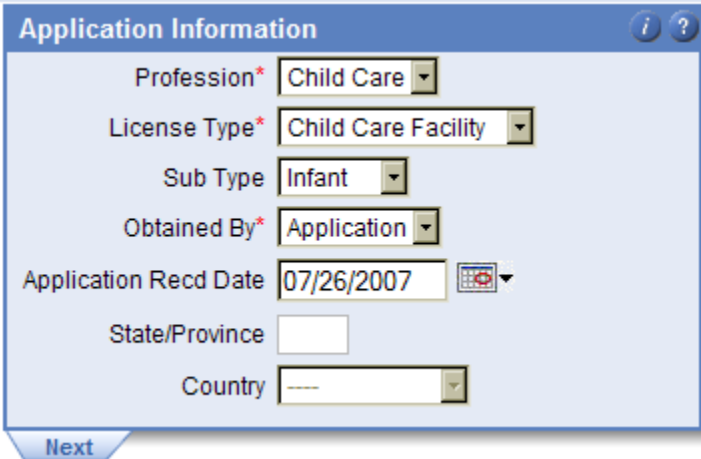
An applicant or licensee may have multiple licenses. For example, to prescribe controlled substances, one would need to be a licensed medical professional before obtaining a Controlled Substance Registration or CSR license. For facilities such as a hospital, the institution would be required to maintain multiple licenses within the medical professions. Often these licenses might be dependent one each other however, a childcare provider might apply for and obtain license(s) in completely different professions such as Nursing. Another example: is a teacher would make a career change requiring a professional license to practice yet want to maintain the previously held teaching certificate.

Creating a new license application for an existing licensee begins with the same steps outlined in the procedure for creating: [Create New Applicant: Person](#) or [Create New Applicant: Facility](#).

Choose **Applicant > Create** from the **Navigation menu**.

Complete the **Application Information** panel. See: [Create New Applicant](#).

Like a new license application, the ability to create a new license for an existing applicant or licensee is based on license type. That is, only certain license types belong to either a facility or person.



The screenshot shows a software window titled "Application Information" with a blue header and a light blue background. It contains several form fields:

- Profession***: A dropdown menu with "Child Care" selected.
- License Type***: A dropdown menu with "Child Care Facility" selected.
- Sub Type**: A dropdown menu with "Infant" selected.
- Obtained By***: A dropdown menu with "Application" selected.
- Application Recd Date**: A text input field containing "07/26/2007" and a calendar icon to its right.
- State/Province**: An empty text input field.
- Country**: A dropdown menu with "--" selected.

At the bottom left of the window is a blue button labeled "Next".

Figure I-35: Application Information Panel - Create License, Facility

Select the **Profession** (* **Required Field**) and a **Sub Type** if required from the drop-down lists.

Select the **Obtained By** method (* **Required Field**), and **Application Recd Date**.

Select the **State/Province** the **Country** field will automatically populate based on the State/Province entry.

Click the **Next** tab once the appropriate license information has been entered into the **Application Information** panel. Depending on the **License** type selected, either the **Facility** or **Person Search** panel will be displayed as shown in [Figure I-36](#).

Enter the search criteria necessary to locate the applicant or licensee record. Click the **Search** tab. See: [Applicant Search](#).

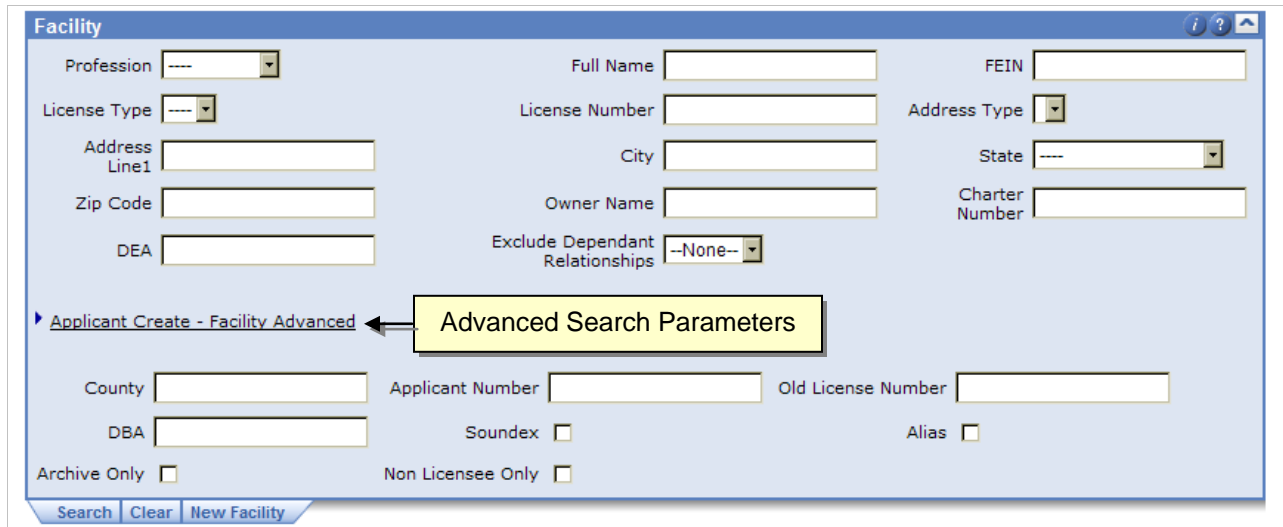


Figure I-36: Search Panel - Create New Applicant, Facility

If the desired applicant or licensee is not found, click the **Clear** tab on the **Facility Search** panel and refine the search parameters.

A new Person or Facility may also be created by clicking on the **New Person** or **New Facility** tab on the **Search** panel. See: [Create New Applicant: Person](#) or [Create New Applicant: Facility](#). If the applicant or licensee is located as a result of the search, click the **License** link in the **Name / License Type** column of the **Search Results** panel to select the desired record. The selected record is highlighted. See: [Figure I-37](#).

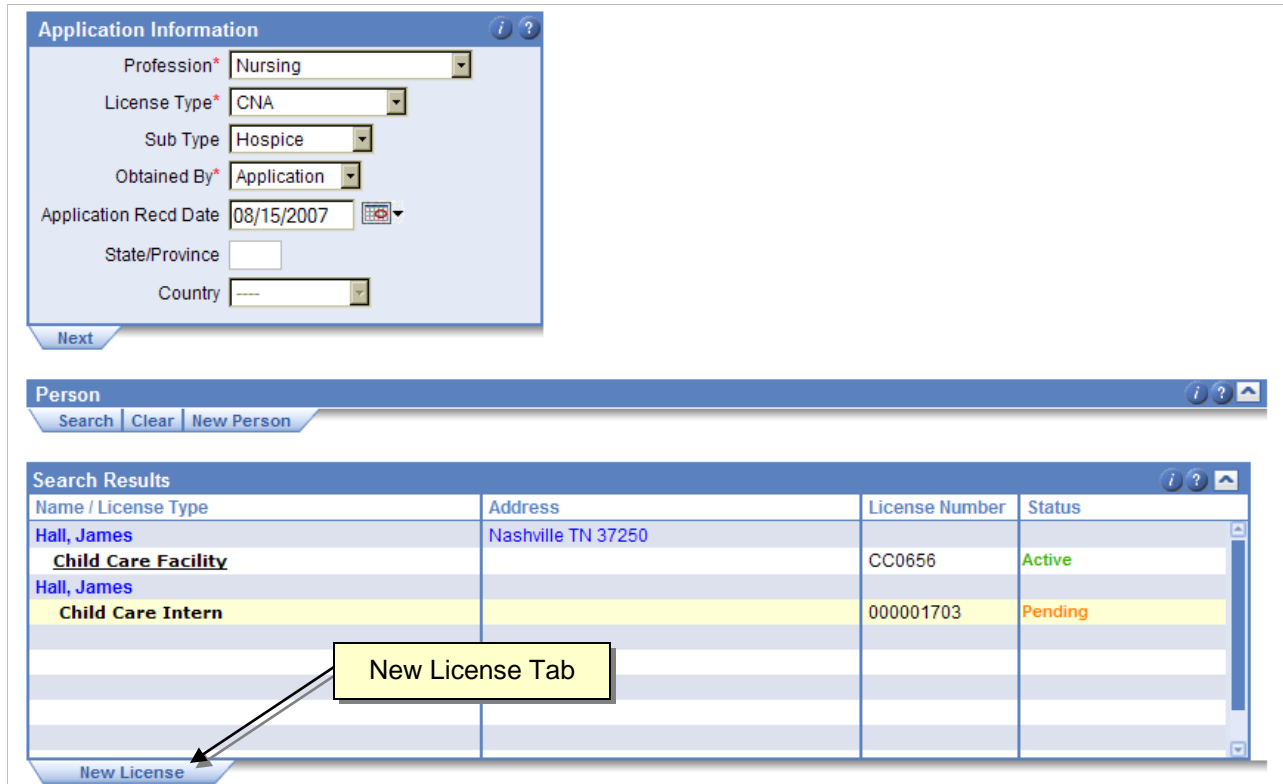


Figure I-37: Search Results and Selected Applicant - Create Applicant

Note that in [Figure I-37](#), A **New License** function is made available. To create a new license for the applicant or licensee for the profession and license type previously selected in the **Application Information** panel, click the **New License** tab on the **Search Results** panel.

The applicant's **Summary**, **License Information** and **Address Information** panels will be displayed as depicted in [Figure I-38](#). In the event it is necessary to correct any information listed on the applicant's **Summary** panel or return to previous pages, click the **Back** button.

The screenshot displays three main panels in a web application interface:

- Summary Panel:** A table with the following data:

Name	Address	License Type	License Number	License Status
James Hall	Nashville TN 37250		N/A	N/A
- License Information Panel:** Contains a 'DBA' text input field and a 'Doing Business As' button. An arrow points from the button to the input field.
- Address Information Panel:** Contains various input fields:
 - Addr Line 1, 2, 3
 - City: Nashville (dropdown), State: TN, Zip Code: 37250-
 - Country: United States (dropdown), County: Davidson (dropdown), Jurisdiction: ---- (dropdown)
 - Phone, Fax, Email, Cell (all text inputs)
 - Unlisted? checkboxes for Phone and Fax
 - Select Email: Other (dropdown), Mailing Address checkbox
 - Email Merge Address (text input)

At the bottom of the form are buttons for 'Copy General Address', 'Copy Prereq Address', 'Finish', and 'Back'.

Figure I-38: Summary and License Information Panels - Create Applicant

A **DBA** (short for "doing business as"), fictitious business name or assumed name permits the applicant or other entity to do business as a particular name, which may be recorded in the **DBA** text box, provided in the **License Information** panel shown in [Figure I-38](#).

The address information entered in the **Address Information** panel shown in [Figure I-39](#) is the Address of Record or the address information for the license (not the applicant).

If the address for the license itself or the Address of Record is different from the **General Address**, complete all the appropriate address information fields. If the address is the same as the applicant's general address, click the **Copy General Address** tab on the **Address Information** panel. The general address data previously recorded will populate the **Address Information** panel fields. Once the address fields are populated, address data may be altered or additional address information added.

The screenshot shows the 'Address Information' panel with the following fields and values:

- Addr Line 1: 10 Capital Ave
- Addr Line 2: (empty)
- Addr Line 3: (empty)
- City: Nashville
- State: TN
- Zip Code *: 37222-
- Country: United States
- County: Davidson
- Jurisdiction: Enforcement 1
- Phone: (615) 543-3214
- Fax: (615) 543-3213
- Email: (empty)
- Cell: (615) 902-3215
- Select Email: Other
- Email Merge Address: (empty)

Checkboxes: Unlisted Address (checked), Unlisted? (unchecked), Unlisted? (checked), Mailing Address (unchecked).

Buttons: Map It, Copy General Address, Copy Prereq Address.

Figure I-39: Address Information - Create Applicant

Mark the **Mailing Address** checkbox to indicate this is the correct mailing address.

The **Email Merge Address** field permits MyLicense Office[®] data to be merged into a standard document that is then created in an Email message. The Email merge feature can be used when sending notifications such as renewal notices, changes in status, disciplinary actions, inspections, fees, audits, regulatory information and other correspondence having an effect on licensure.

The **Jurisdiction** drop-down contains values that represent the various authorities or geographic area over which authority extends that may administer or otherwise have legal or oversight capacity concerning the license.

Clicking the **Copy Prereq** tab will populate the **Address Information** panel fields with the license address of a prerequisite license. See: in the Guide to the User Interface.

Click the **Finish** button when the **License Information** and **Address Information** panels are completed. To discard and return to the previous page, click the **Back** button.

The page is refreshed to the **Applicant: Edit** page where the newly created **License** application is displayed and selected in the **Search Results** panel.

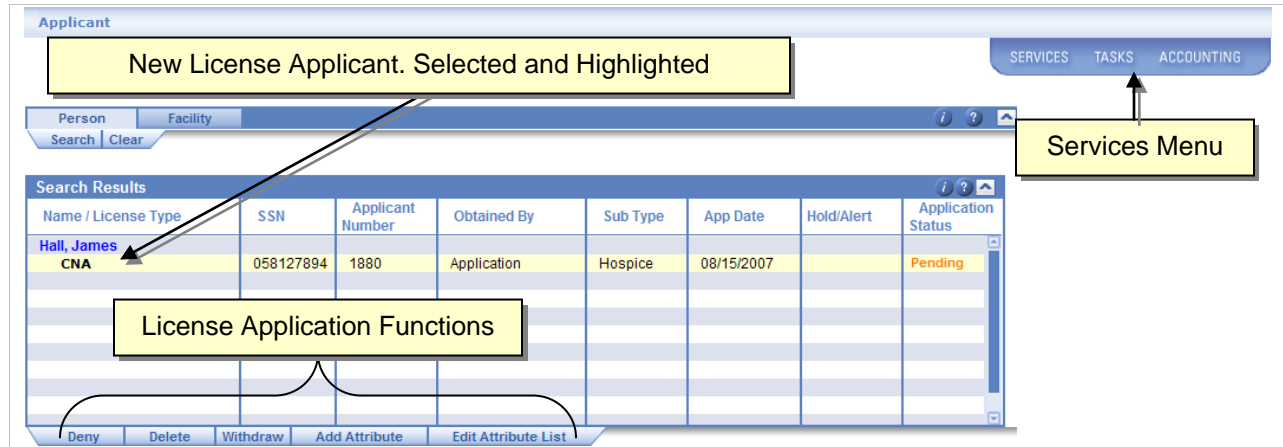


Figure I-40: Search Results Selected - New License Application, Person

On the **Applicant Edit** page, the user will have a variety of options to continue to process the applicant's new license and insert new, edit or delete relevant data as it pertains to the applicant and license.

The **Search Results** panel displays tabs that function to deny the application see: [Deny License Application](#). To delete the application see: [Delete License Application](#). To withdraw the application, see: [Withdraw License Application](#). To add attributes to the license see: [Add License Attribute](#) and to edit the attribute list values see: [View License Attribute List](#).

The **Services: Tasks** and **Accounting** menu options are made available. See: For information on how to use the **Tasks: Services Menu**, **Tasks: Tasks Menu**, or **Tasks: Accounting Menu** menus and options, see:.

Depending on the profession and the license type, some of the **Mini-panels** listed in [Table I-9](#): will appear on the **Applicant Edit** page below the **Search Results** panel. In addition, other *User Defined Objects* configured by System Administrators may also be displayed.

Mini-Panels – New Applicant: Person			
Alias	Document	Education	Employer
Employment	Exam.	Inspection	License
License Bond	License CSR	Person	Prerequisites
Previous Licenses	Specialties	Requirements	Teacher Highly Qualified
User Defined Objects			

Table I-9: Create New Applicant: Person Mini-panels

To add new, view, edit or otherwise manage other details about the applicant or the new license, click on the **Details** button of the relevant **Mini-panels** displayed below the **Search Results** panel. For more information on **Mini-panels**, see: [Appendix A – Mini-panels](#).

See: [Complete New Applicant and License Application](#) to complete the license application.



NOTE: Depending on your present configuration of MyLicense Office[®], some data elements or objects displayed on the various “**Create New Person**” panels may or may not be exposed. See your System Administrator.

Complete New Applicant and License Application

When a new license application has been created for an existing applicant or licensee, or the respective **Person** or **Facility** applicant is created as a function of the new applicant process, the following procedure completes the initial License application.

The applicant's **Summary**, **License Information** and **Address Information** panels will be displayed as depicted in [Figure I-41](#). In the event it is necessary to correct any information listed on the applicant's **Summary** panel or return to previous pages, click the **Back** button.

Applicant Summary - Data Columns

Applicant Summary – Data Columns	
Address:	Displays the address of record or the address for the license (not the Person or Facility).
License Number:	Displays the unique license number assigned by the licensing agency, which identifies the license or application and the applicant or holder of the license.
License Status	Is the current status of the license. For more information on statuses and their meanings, see: Status: Application in Guide to the User Interface.
License Type:	Displays the license type associated with the application. License Type is defined by Profession . For example, in the Nursing profession there are several license types such as CNA, LPN, RN, Nurse Practitioner, etc.
Name:	Is the column that displays the applicant’s name with the last name followed by the first name in the case of an individual or the full name of a facility or other business entity.

Table I-10: New Applicant: Summary Panel Columns

Summary				
Name	Address	License Type	License Number	License Status
James Hall	Nashville TN 37250		N/A	N/A

License Information	
DBA	<input type="text"/>

Address Information					
Addr Line 1	<input type="text"/>	Map It	Unlisted Address <input type="checkbox"/>		
Addr Line 2	<input type="text"/>				
Addr Line 3	<input type="text"/>				
City	Nashville	State	TN	Zip Code *	37250-
Country	United States	County	Davidson	Jurisdiction	---
Phone	<input type="text"/>	Unlisted?	<input type="checkbox"/>		
Fax	<input type="text"/>	Unlisted?	<input type="checkbox"/>		
Email	<input type="text"/>				
Cell	<input type="text"/>				
Select Email	Other	Mailing Address <input type="checkbox"/>			
Email Merge Address	<input type="text"/>				

Copy General Address Copy Prereq Address

Finish Back

Figure I-41: Summary and License Information - Create Applicant

DBA short for "Doing Business As", is a fictitious business name or assumed name. In the event an individual, facility or other business applicant is operating under an assumed name, the "Doing Business As" name may be recorded in the **DBA** text box, provided in the **License Information** panel shown in [Figure I-41](#).

The address information entered in the **Address Information** panel shown in [Figure I-42](#) is the Address of Record or the address information for the license (not the applicant).

If the address for the license itself or the Address of Record is different from the **General Address**, complete all the appropriate address information fields. If the address is the same as the applicant's general address, click the **Copy General Address** tab on the **Address Information** panel. The general address data previously recorded will populate the **Address Information** panel fields. Once the address fields are populated, address data may be altered or additional address information added.

The screenshot shows a web form titled "Address Information" with a blue header bar. The form contains the following fields and controls:

- Addr Line 1: Text input with "10 Capital Ave" and a "Map It" icon.
- Addr Line 2: Empty text input.
- Addr Line 3: Empty text input.
- City: Dropdown menu with "Nashville" selected.
- State: Text input with "TN".
- Zip Code *: Text input with "37222-".
- Country: Dropdown menu with "United States" selected.
- County: Dropdown menu with "Davidson" selected.
- Jurisdiction: Dropdown menu with "Enforcement 1" selected.
- Phone: Text input with "(615) 543-3214" and an "Unlisted?" checkbox (unchecked).
- Fax: Text input with "(615) 543-3213" and an "Unlisted?" checkbox (checked).
- Email: Empty text input.
- Cell: Text input with "(615) 902-3215".
- Select Email: Dropdown menu with "Other" selected.
- Mailing Address: Checkbox (unchecked).
- Email Merge Address: Empty text input.

At the bottom of the form, there are two tabs: "Copy General Address" and "Copy Prereq Address".

Figure I-42: Address Information - Create Applicant

Mark the **Mailing Address** checkbox to indicate this is the correct mailing address.

The **Email Merge Address** field permits MyLicense Office[®] data to be merged into a standard document that is then created in an Email message. The Email merge feature can be used when sending notifications such as renewal notices, changes in status, disciplinary actions, inspections, fees, audits, regulatory information and other correspondence having an effect on licensure.

The **Jurisdiction** drop-down contains values that represent the various authorities or geographic area over which authority extends that may administer or otherwise have legal or oversight capacity concerning the license.

Clicking the **Copy Prereq** tab will populate the **Address Information** panel fields with the license address of a prerequisite license. See: in the Guide to the User Interface.

Click the **Finish** button when the **License Information** and **Address Information** panels are completed. To discard and return to the previous page, click the **Back** button.

The page is refreshed to the **Applicant: Edit** page where the newly created **License** application is displayed and selected in the **Search Results** panel.

Applicant

SERVICES TASKS ACCOUNTING

Person Facility

Search Clear

Search Results

Name / License Type	SSN	Applicant Number	Obtained By	Sub Type	App Date	Hold/Alert	Application Status
Hall, James CNA	058127894	1880	Application	Hospice	08/15/2007		Pending

Deny Delete Withdraw Add Attribute Edit Attribute List

Person Details

Requirements Details

Item	Status	Date
Specialty Requirement	Incomplete	
Renewal Fee	Unchecked	

Education Details

School Name	Profession	Date Enrolled	Degree Certificate
No Data			

Exam Details

Date of Exam	State of exam	Exam Score	Review
No Data			

Employer Details

Name of Employer	Number Of Hours	Position Name	Comments
No Data			

Alias Details

Date Changed	Alias Type	Last Name	Middle Name
No Data			

Document Details

Name	Description	Date Uploaded
No Data		

License CSR Details

No Data

License Details

Specialties Details

Specialties	Issue Date	Expiration Date	Is Primary
No Data			

Inspection Details

Inspection Id	Inspection Type	Inspection Date	Inspection Status
No Data			

Prerequisites Details

Name	License Type	License #	Status
No Data			

Employment Details

Name of Employer	Start Date	Position Name	End Date
No Data			

License Bond Details

No Data

Previous Licenses Details

State of previous License	Previous License Number	Issue Date
No Data		

TeacherHighlyQualified Details

Subject	Source	Grade
No Data		

Figure I-43: Search Results Selected - New License Application, Person

The **License** application with a **Pending** status, has now been successfully created and recorded in MyLicense Office® system database.

The page and panels shown in [Figure I-43](#), are part of the application editing process. On the **Applicant Edit page**, the user will have a variety of options to continue to process the applicant’s new license and insert new, edit, delete or otherwise manage relevant data as it pertains to the applicant and license. For more information on editing license applications, see: [Applicant Edit](#).

The **Search Results** panel displays tabs that function to deny the application see: [Deny License Application](#). To delete the application see: [Delete License Application](#). To withdraw the application, see: [Withdraw License Application](#). To add attributes to the license see: [Add License Attribute](#) and to edit the attribute list values see: [View License Attribute List](#).

The **Services: Tasks** and **Accounting** menu options are made available. See:. For information on how to use the [Tasks: Services Menu](#), [Tasks: Tasks Menu](#), or [Tasks: Accounting Menu](#) and options, see:.

Depending on the profession and the license type, some of the **Mini-panels** listed in [Table I-11](#) will appear on the **Applicant Edit** page below the **Search Results** panel. In addition, other *User Defined Objects* configured by System Administrators may also be displayed.

Mini-Panels – New Applicant: Person			
Alias	Document	Education	Employer
Employment	Exam.	Inspection	License
License Bond	License CSR	Person	Prerequisites
Previous Licenses	Specialties	Requirements	Teacher Highly Qualified
User Defined Objects			

Table I-11: Applicant: Person Mini-panels

To add new, view, edit or otherwise manage other details about the applicant or the new license, click on the **Details** button of the relevant **Mini-panels** displayed below the **Search Results** panel. For more information on **Mini-panels**, see: [Appendix A – Mini-panels](#).



NOTE: Depending on your present configuration of MyLicense Office[®], some data elements or objects displayed on the various “**Create New Person**” panels may or may not be exposed. See your System Administrator.
