Registry Terms and Conditions

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Untracked Terms and Conditions

At Enrollment

Untracked Terms and Conditions can be rendered while completing a Petition by placing them in the Petition Conclusion of an Enrollment Flow. There is no enforcement of T&C (ie: the petitioner does not need to click anything other than the normal submit button) and there is no record kept of agreement.

At Login

This capability is not currently available (CO-925).

Tracked Terms and Conditions

COmanage Registry can track agreement to Terms and Conditions for CO participants. In order to enable this feature, define Terms and Conditions via Organizations >> *CO* >> Configuration >> Terms and Conditions.

When defining Terms and Conditions, note the following fields:

- URL: The URL at which the Terms and Conditions can be found. This URL will be retrieved and rendered in the browser when the Terms and Conditions are reviewed for agreement. It is suggested that the target page be relatively simple in terms of markup.
- COU: Terms and Conditions can apply to members of a specific COU. If no COU is specified, then they are applied to all members of the CO.
- Status: Only Active Terms and Conditions are presented for agreement.

Agreement At Enrollment

Terms and Conditions at enrollment can be configured in several ways. This configuration is available per-Enrollment Flow.

1. Explicit Consent: In order to submit the enrollment form, the petitioner must review and then agree to each relevant Terms and Conditions. Agreement is recorded at the time of submission.
2. Implied Consent: Relevant Terms and Conditions are presented on the enrollment form, but the agreement box is pre-checked (and cannot be unchecked). Petitioners are encouraged, but not required, to review the Terms and Conditions before submission. Agreement is recorded at the time of submission.
3. Splash Page: Not currently implemented (CO-923). However, see *Agreement After Enrollment*, below, for similar functionality.
4. Ignore: Terms and Conditions are neither presented nor required at enrollment.

Relevant Terms and Conditions at Enrollment (v4.0.0 and later)

When an Enrollment Flow is configured for either Explicit Consent or Implied Consent, the following constraints are applied:

1. The Terms and Conditions must be in Active status.
2. The Terms and Conditions apply to the entire CO, or to the COU associated with the Enrollment Flow (if any).

T&C must be agreed to as part of a separate step, suitable for both self-signup and invitation flows.

- In Registry v4.0.x, T&C are presented after Email Confirmation (if enabled) and prior to Approval (if required).
- In Registry v4.1.0 and later, if *Petitioner Enrollment Authorization* is set to *None* or *Authenticated User*, T&C are presented immediately after Petitioner Attributes, otherwise the same behavior is used as for Registry v4.0.x.

Registry v4.0.0 and later support T&C for anonymous (unauthenticated) enrollments. The petition's *Enrollee Token* will be used as the authenticated identifier to allow for later (database level) audit, and the T&C Agreement will be correctly linked to the newly created CO Person record.

Relevant Terms and Conditions at Enrollment (v3.3.4 and earlier)

When an Enrollment Flow is configured for either Explicit Consent or Implied Consent, the following constraints are applied:

1. Authentication must be required for the Enrollment Flow.

2. The Terms and Conditions apply to the entire CO. T&C that are specific to a COU will not be prompted for during enrollment (~~CO-700~~).
3. The Terms and Conditions must be in Active status.

T&C must be agreed to as part of Petitioner Attributes, meaning they are primarily suitable for self-signup flows.

Agreement After Enrollment

An already active CO Person can login to Registry and review Terms and Conditions via the *My Identity* menu.

In addition, a CO can enforce agreement to Terms and Conditions at login. This setting is enabled via *CO Settings >> Terms and Conditions Mode*. Note that current agreements are retrieved at login but enforced when a CO-specific page is retrieved. Therefore, if this setting is changed, currently logged in users will not be required to agree to pending Terms and Conditions until their next login.

Only login to Registry is affected, not to applications that are integrated with COmanage. In a future release, it may be possible to disable access to services until Terms and Conditions are agreed to (CO-928).

Requiring Terms and Conditions at login applies to CO and COU administrators as well, and they will be required to agree to any pending T&C before accessing most Registry functions.

Agreement on Behalf After Enrollment

A CO Admin may agree to Terms and Conditions on behalf of a CO Person by viewing the appropriate CO Person record and selecting *Review Terms and Conditions*.

Reviewing Terms and Conditions

The Terms and Conditions agreed to by individual CO People can be viewed by retrieving the appropriate CO Person record and selecting *Review Terms and Conditions*.

Reporting capabilities are planned (CO-701).

Editing Terms and Conditions

If a tracked Terms and Conditions is edited (changing the URL, the description, etc), existing T&C Agreements will be considered valid, though as of Registry v2.0.0 the existing agreements will point to the original definition.

To change Terms and Conditions in such a way as to require everyone to agree to them, create a new Terms and Conditions entry.