

HEARTLINE ROMANIA

How the systems work

A guided tour of governance, casework, partners, finance and portals — end to end.

July 2026 · Internal reference

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What we'll cover

Ten sections. Each section pairs the concept with the tables and screens that implement it.

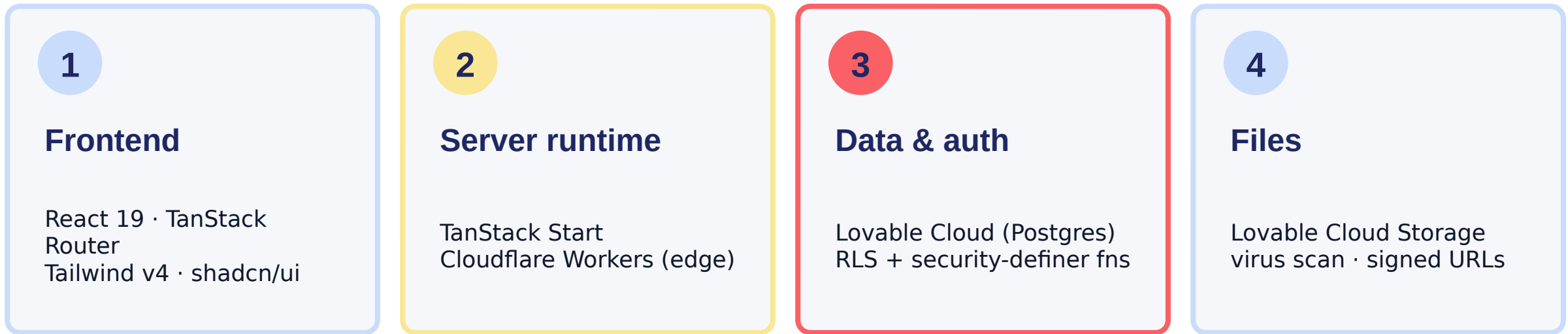
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SECTION 01

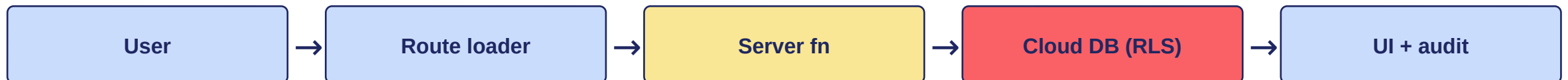
Platform architecture

TanStack Start on Cloudflare Workers · Lovable Cloud for data & auth · RLS everywhere.

The stack in one picture



Every write goes through createServerFn or a webhook route — the browser never holds service-role credentials.



Auth, roles, and the RLS discipline

Roles live in `user_roles`, never on profiles — checked with a SECURITY DEFINER helper `has_role(user_id, role)`.



admin / Sole Member

Ultimate authority. Issues ORDERS, approves partners.



secretary / treasurer

Governance and finance oversight.



staff

Casework, notes, timeline, uploads.



agency / attorney / notary / hospital

Partner portals gated by their org membership.



executive_director

Day-to-day operations. Co-signs where required.



regional_officer

Scoped to a case region — sees only their region's cases.



apostille_partner

External. Sees only ORDER-authorized cases.



public / authenticated

Registry search, disclaimers, sign-up.

SECTION 02

Governance & the ORDER model

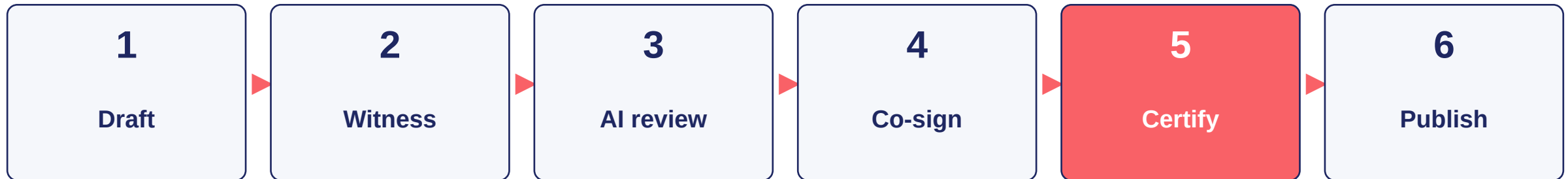
Everything sensitive flows through a signed ORDER. No ORDER, no action.

Anatomy of a Sole-Member ORDER

Issuer	Sole Member, ED, or regional officer with jurisdiction.
Type	Apostille transfer · view authorization · recall · rescission · broadcast.
Scope	Fine-grained flags: case_metadata, retrieve_docs, apostille_documents, upload_apostilled.
Grantee	A user, a partner company, or a region.
Expiry	Default 30 days · auto-revoked on recall.
Co-signatures	Required for elevated actions · tracked in sole_member_order_csignatures.
Audit trail	audit_logs entry + case_timeline event on issue, use, revoke.

Board resolutions & the certification chain

Sole Member drafts → witnesses → AI compliance check → co-signatures → certification → public archive.



Backed by tables: board_resolutions · board_resolution_signatures · board_resolution_reads · resolution_certified_orders.

Immediate side-effects on certification:

- Linked ORDERS become active — partners and regional officers see new authority.
- board_notifications fan out to affected roles.
- audit_logs records the certified snapshot with signer identities.

SECTION 03

Case lifecycle

Intake to closure. Every phase writes to the timeline.

The pipeline



Inside the case workspace

Timeline

Immutable events with staff attribution

Documents

Uploads, signed URLs, virus-scanned

Notes & tasks

Assignable, region-locked

Messages

Threaded with partners

Analysis

AI-generated with match audit

Active ORDERS

What's currently authorized on this case

Compliance alerts

Missing docs, expiring auths

Billing

Time entries roll into invoices

Cosignatures

Sole Member / ED signatures live here

SECTION 04

Regional & role-based access

Region officers own their region. Everyone else needs an ORDER to look in.

How region gating works

case_view_authorizations is the single source of truth: user_id OR partner_company_id, scoped and expiring.

Layer 1 — Role

user_roles: does the caller hold the role at all?

Layer 2 — Region

staff_region_covers_case_history: does the caller cover this case's region right now?

Layer 3 — ORDER

case_view_authorizations: is there a live grant for this case?

Layer 4 — Scope

Which fields/documents does this ORDER permit?

SECTION 05

Partner network

Agencies, attorneys, notaries, hospitals, government — each with a portal and a DSA.

Five partner types, one pattern

Type	Purpose	Portal	Key tables
Agency	Adoption records	/agency-requests	agency_partners · agency_record_requests
Attorney	Case counsel	/attorney	attorney_offices · attorney_case_assignments
Notary	Notarization queue	/notary	notary_partner_codes · notary_upload_queue
Hospital	Birth records	(intake)	hospital_partners · hospital_uploads
Gov agency	Certifications	(intake)	government_agencies · record_certifications
Apostille	CA SoS & foreign auth.	/apostille	apostille_partner_companies · apostille_issuance_log

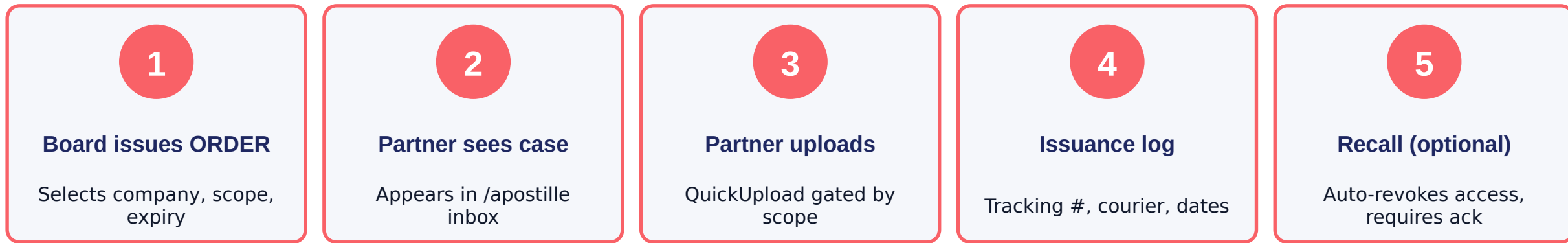
Every partner requires an active DSA (data sharing agreement) before receiving any case data.

SECTION 06

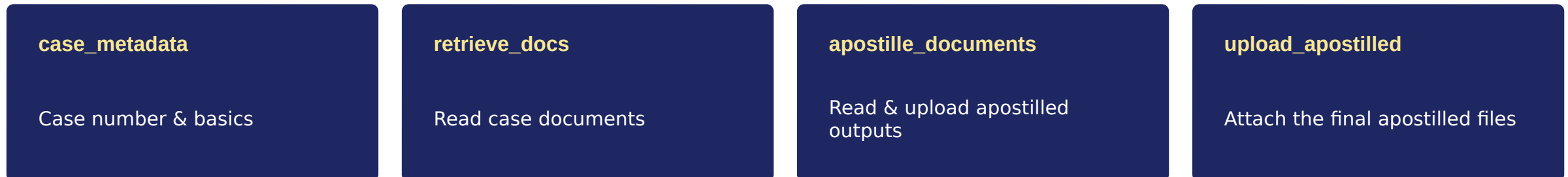
Apostille partner portal

External authenticators see cases only when a signed ORDER authorizes them.

From order issuance to apostilled document



Scope flags determine disclosure

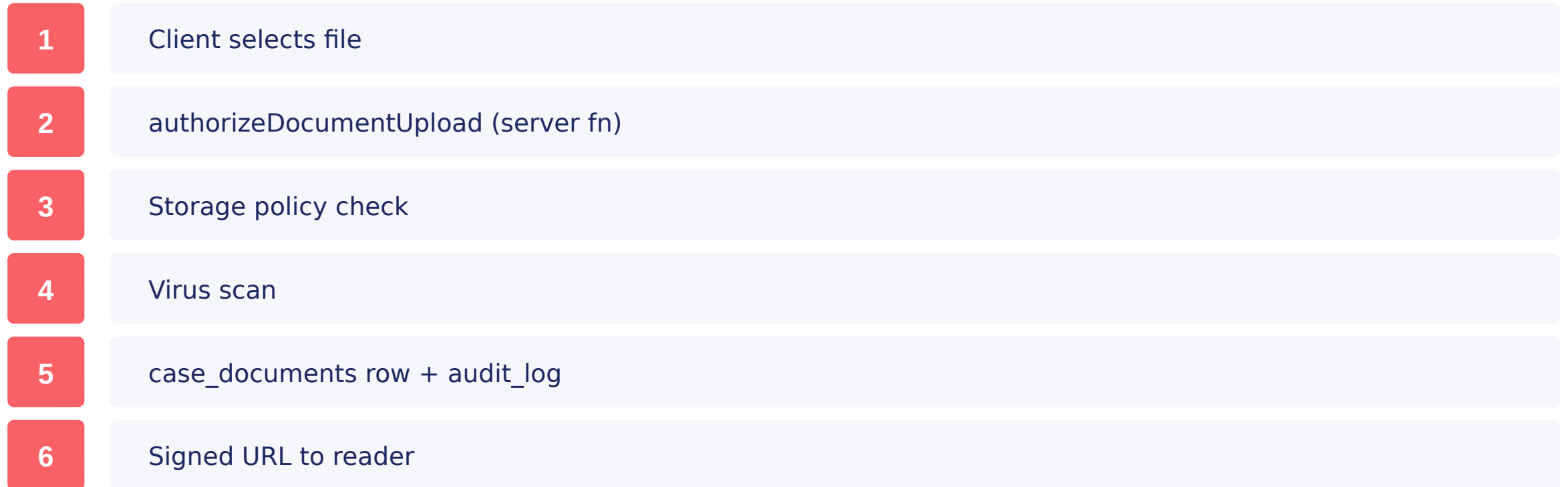


SECTION 07

Documents, uploads & audit

Storage policies enforce who can write. Every action is logged.

Upload pipeline



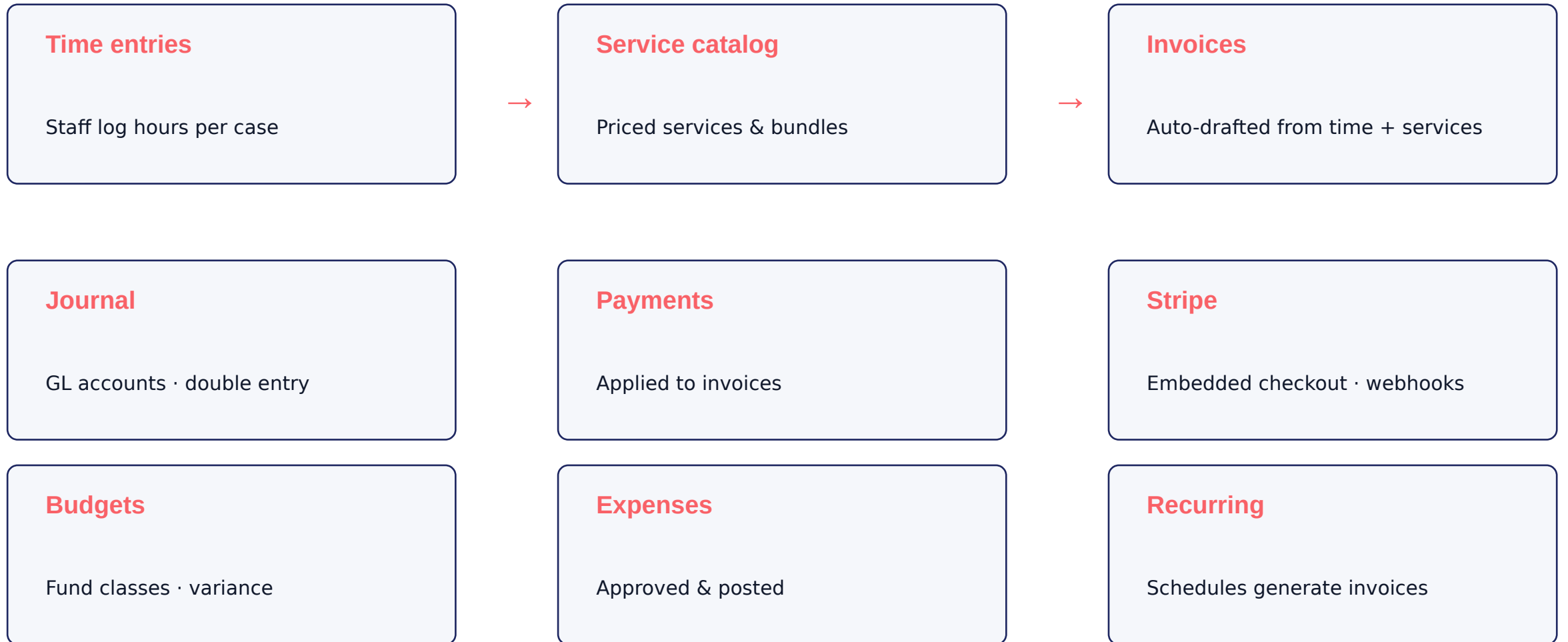
Authorization sources: isAdmin · isOwner · canStaffView · apostille_partner_can_access_case_documents.

SECTION 08

Finance & billing

Time → invoices → payments → journal → budgets. All double-entry.

Money moves in a loop



SECTION 09

Compliance & security

KYC gates, disclaimers, complaints, and continuous audit.

Guardrails around every workflow



KYC gate

portal_kyc_verifications — required before sensitive views



Legal disclaimers

legal_disclaimer_acknowledgments — versioned, per-user



Approval codes

approval_codes — one-time elevation for admin ops



Compliance runs

case_compliance_alerts — nightly & on-demand checks



Complaints

Full ticketing: messages, attachments, escalations



Passkeys / MFA

WebAuthn for board & partner accounts



Audit logs

audit_logs writes for every mutation with actor & IP



Client error reports

In-app error capture surfaces to /admin/errors

SECTION 10

Public surfaces

What the world sees — and how they get in.

Public routes at a glance

Registry search

Footer widget — public case lookup

Public resolutions

Certified board actions, archived by year

Meetings

Public meeting schedule & minutes

Complaints intake

File a complaint without an account

Partner apply

Agency, attorney, notary & apostille applications

Transparency

KPIs, financials, region-by-region

Intellectual property notice

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The ORDER-scoped authorization model, regional coverage engine, and partner-portal architecture constitute proprietary trade secrets protected under the U.S. Defend Trade Secrets Act (18 U.S.C. § 1836) and the Iowa Uniform Trade Secrets Act (Iowa Code ch. 550).

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State of Iowa

This platform, the associated Data Sharing Agreements, partner terms, and any dispute arising out of or relating to the Heartline systems shall be governed by and construed in accordance with the laws of the State of Iowa, without regard to its conflict-of-laws principles.

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United States of America

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Venue

Polk County, Iowa

The parties consent to the exclusive jurisdiction and venue of the state and federal courts located in Polk County, Iowa for any action arising under or relating to the Heartline platform, and waive any objection based on forum non conveniens.

Enforcement

Injunctive relief available

Heartline Romania is entitled to seek injunctive and equitable relief in any court of competent jurisdiction to protect its intellectual property, trade secrets, and confidential information, in addition to any other remedies available at law.

One rule to remember

No ORDER, no access.

Every sensitive read, every partner upload, every regional handoff is authorized by a signed, expiring, auditable ORDER. That is the whole system, in one sentence.

Heartline Romania · Systems documentation · July 2026

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