Delegate or Contact

What is the Difference?
A Delegate is an individual authorized by an account owner to view and/or access their records. In addition to viewing record information, the account owner may authorize a delegate to perform, from the account owner’s account, any or all of the following actions.

- Create Applications
- Renew Records
- Amend Records
- Manage Inspections
- Manage Documents
- Make Payments
Manage Delegates from your Account Management page. Managing Delegates includes: Adding, Viewing, Editing or Removing.
• A Contact is an individual or an organization with whom the account owner is in partnership with on specific projects.
  • A contact may be an engineer, a property owner or a company.
  • Contacts may be used for a single project or for multiple projects.
  • The account owner may add or remove a contact on a record or their account.
• Unlike a delegate, a contact has limited access to records and only for the following actions.
  • Receive Workflow Notifications
  • Schedule Inspections
Contacts are managed in the account owner’s Account Management page. Click the Add a Contact blue tab to add a Contact. Click the Actions drop-down menu to View or Remove a Contact.
## Delegate vs Contact

### Delegate
- Submit Application
- Submit Amendments
- View/Add Documents
- Request Inspections
- Claim a Record
- View Application Details
- Make Payments

### Contact
- Request Inspections
- Receive Workflow Notifications
- Receive Emails
- View Application Details

### Example: ABC Engineers, Inc.
- Ms. Ami Bay, Administrative Assistant
- Mr. Carl Cavanaugh, Project Manager
- Ms. Carla Camille, Office Manager
- Mr. William Aster, President
- Ms. Wendy Kerr, Accountant

### Example: Contacts on Application
- Mr. John Smith, Property Owner
- Ms. Terry Albright, Compass Surveyor
- Mr. Ed Oh, Eng. in Training, ABC Engineers, Inc.
- Tahiti Huts, LLC
- We-Build-It-All Construction, Contractor
- Ms. Jo Ott, Owner, We-Build-It-All Construction
Organization Change Management Team
Contact Information

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