Creating an Escrow Account is a functionality in Citizen Access available to registered users. To register for an account click here: Citizen Access Portal

Due to problems when uploading documents, the recommended browser is Internet Explorer.
Escrow Accounts Explained

Escrow is a process used by customers in the process of completing transactions with an organization.

Here, in the Development Services Department, customers can create an Escrow Account using the Citizen Access Portal.

After creating the Escrow Account, account owners place funds in escrow, and, if they wish, assign an authorized agent with instructions to disburse the funds to the City and pay fees that are due on their records. This way, the transactions between the account owner and the City proceed efficiently.
To create an Escrow Account, login to your Citizen Access portal account.

1. Click the *Create an Escrow Account* tab (#1 shown).
2. The **General Disclaimer** page displays. Use the scroll bar to move up and down and read the General Disclaimer in its entirety.

3. Accept the General Disclaimer terms by clicking the box to the left (#1 shown).

4. Click **Continue Application** (#2 shown).
The system advances to Step 1: User Information>
Information of the application.

5. Review the Applicant Information section.

6. Select Applicant Also Known As roles that apply to the applicant by clicking on the corresponding box. More than one may be selected.

7. Click Continue Application.
Contact List and Application section displays. Select Authorized Agent (Contact) here (#1 shown).

Search first to avoid duplicates. To search, click Look up. If no results are found, click Add New.

8. Select fees options (#2 shown).

9. Type a name for the Account.

10. Click the box to the left of the authorization statement (#3 shown).

11. Click Continue Application (#4 shown).
Using the *Look Up* Option to Add a Contact
After Look Up tab is clicked, the Look Up Contact page displays.

1. Select a Type by clicking the drop-down menu arrow (#1 shown).
2. Type information known (#2 shown)
3. Click Look Up button (#3 shown).

*slides display instructions for Look Up function.*
The system returns all matches for the Contact information.

4. Select a Contact by clicking on the circle to the left of selection (shown).

5. Click Continue.

*Slides display instructions for the Look Up function.*
The system displays the Contact and requires a Type to be selected.

6. Click the drop-down menu arrow to select the type (#1 shown).

7. Next, click the box to the left of Address Type to select both the Mailing and the Physical address for the Contact (#2 shown).

8. Click Continue.

*slides display instructions for the Look Up function.*
The contact List section displays a Contact added successfully message (#1 shown).

The Contact Type displays (#2 shown).

9. Click the boxes corresponding to authorization for unpaid fees (#3 shown).

10. Select a name for the account. If creating several accounts, all must have separate, individual names.

11. Check box for authorization statement (#4 shown).

12. Click Continue Application.

*slides display instructions for the Look Up function.
Using the *Add New* Function to Add a Contact
After Add New tab is clicked (#1 shown), the Select Contact Type page displays (#2 shown).

1. Select a Type by clicking the drop-down menu arrow (shown).
2. Click Continue.

*slides display instructions for Add New function.*
3. Complete all required fields (*).

4. Click the box (#2 shown) to select the Contact from receiving email notifications, as applicable.

5. Click Contact Address (#3 shown).

*Slides display instructions for Add New function.
The Contact Address Information page displays (#1 shown).

6. Click the drop-down menu arrow to select Mailing/Physical addresses. **System requires both.**

7. Click Save and Add Another (#2 shown) until both addresses are entered.

8. Click Save and Close.

*Slides display instructions for Add New function.*
The system displays a Contact added successfully message (#1 shown). Contact and Contact Type is listed (#2 shown).

*slides display instructions for Add New function.*
The bottom of the page is the Application section (#1 shown).

9. Click the boxes corresponding to authorization (#2 shown).

10. Type name for account. All escrow accounts must have separate, individual names.

11. Check box for authorization (#3 shown).

12. Click Continue Application.

*Slides display instructions for Add New function.*
Creating an Escrow Account online does not require documentation.

If choosing to add a document, click the Add button (shown). Click Continue Application.

*Upcoming slides display instructions for uploading documents.
Adding a Document Functionality
To Upload Documentation

The File Upload dialogue box displays (shown). Citizen Access displays maximum file size allowed and type of documentation disallowed (#1 shown).

1. Click the *Add* button (#2 shown) to upload documentation.

*Slides display instructions for uploading documents.*
Browser window displays.

2. Double-click a file to select and upload (#1 shown). More than one file may be uploaded.

*Slides display instructions for uploading documents.*
File Upload window displays (shown).

Uploaded files display (#1 shown). Ensure they fully upload to 100% before continuing.

3. Click Continue (#2 shown).

- Note: Click the Add button once more to add additional documentation or the Remove All button to remove upload and start again.

*Slides display instructions for uploading documents.
4. Click drop down menu arrow to select file type (#1 shown).

5. Type brief description (#2 shown).

6. Click blue Save button (#3 shown).

7. Click Continue Application.
Green banner displays if documents upload successfully.

Uploaded files display in Attachment section (shown).

To add more documents, click Add.

8. Click Continue Application.
The system advances to Step 2: Review.

9. Review sections by clicking on its corresponding Edit tab.

10. Scroll to the bottom of the page to read the OATH certification.

11. Click the box (#1 shown) to agree with terms.

12. Click Continue Application.
The system advances to Step 3: Record Issuance. Green banner displays indicating application is complete. Escrow Account number displays directly below the green banner (shown). This number is needed to access the Escrow Account, create amendments, deposit money and view balance.
Accessing the Escrow Account After it is Created
1. Log in to your Citizen Access portal account.

2. From the Home page, navigate to the Profile section of the page (#2 shown).

3. Click Search Applications (#3 shown).
4. Locate the Escrow Account Record Number.

5. Click its link (blue text) to view record details.
6. Use the scroll bar (shown) to move from left to right on the screen.

7. Click Amendment link to access the Add/Remove Contact and Withdrawal/or Refund Request functionality.

- Tip: See Escrow Account Amendments and Deposit tutorial.
8. To view the Escrow Account Record and its details, click the Record Number link (shown below). The Record Details page displays (shown to the right).
9. To deposit money into the account, click Payments drop-down menu.

10. Click Escrow Account Information (shown).

   Tip: See Escrow Account Amendments and Deposit tutorial.
Creating an Escrow Account

This concludes Lesson 1