

The recommended browser is Google Chrome.



Creating an Escrow Account

09/29/2020

09/29/2020

Escrow Accounts Explained

Escrow is a process used by customers in the process of completing transactions with Development Services Department.

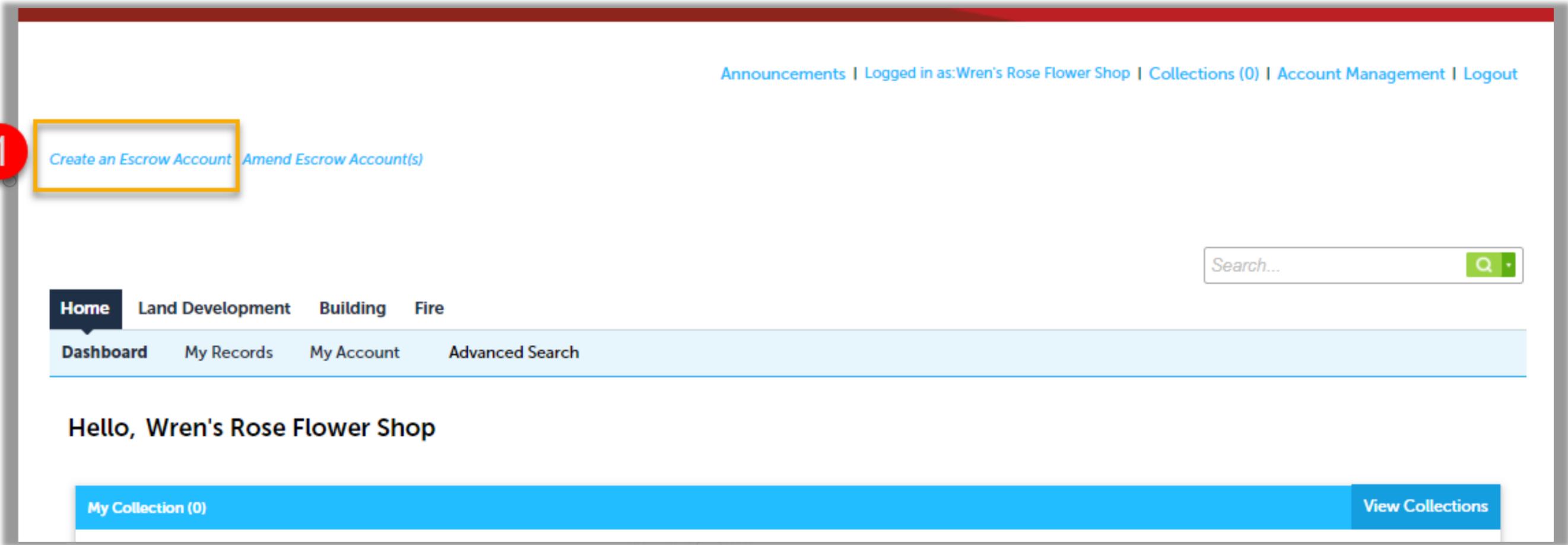
Development Services Department customers can create an Escrow Account using the [Citizen Access Portal](#).

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 due on their records. This way, the transactions between the account owner and the city proceed efficiently.

Escrow Accounts Explained

Creating an Escrow Account is a functionality of Citizen Access available to registered users. To register for an account click here: [Citizen Access Portal](#)

Please contact Development Services Department Customer Call Center with questions, M-F, 7:45am to 4:30pm, (210) 207-1111 or email [Call Center](#).



After login to your account, click Create an Escrow Account (#1) link located at the top of your home page.

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Online Application

Welcome to the City of San Antonio Development Services Department's Online Permitting System. Use this system from the convenience of your home or office, 24 hours a day to:

- Submit and update information
- Pay fees
- Schedule inspections
- Track the status of your applications
- Print your final record

To get started you MUST:

- "Allow Pop-ups from This Site" - More information can be found at www.sanantonio.gov/dsd/BuildSAHelp.aspx
- Accept the General Disclaimer below

General Disclaimer
All City of San Antonio web sites, including but not limited to the Development Services Department Customer Portal, www.sanantonio.gov, www.ci.sat.tx.us, www.sanantonio.gov/GIS, www.alamodome.com, www.sanantoniocvb.com, www.visitsanantonio.com, mysapl.org and sapl.sat.lib.tx.us are provided as a public service. PLEASE NOTE that users of these web sites are responsible for checking the accuracy, completeness, currency and/or suitability of all information. The CITY OF SAN ANTONIO makes no representations, guarantees, or warranties as to the accuracy, completeness, currency, or suitability of the

I have read and accepted the above terms.

1 I have read and accepted the above terms.

2 [Continue Application »](#)

This is the General Disclaimer page. Read through the Disclaimer. Click the box to the left of the statement (#1).

The General Disclaimer page displays. Read through the Disclaimer. Click the box to the left (#1) to accept terms. Click *Continue Application* (#2).

Escrow Account

1 User Information | 2 Review | 3 Validate Fees | 4 Record Issuance

Step 1: User Information > User Information ←

* indicates a required field.

Applicant

To edit the Applicant Information, use your Account Management page.

Wren's Rose Flower Shop
 patricia.rosas@sanantonio.gov
 Home phone: 800-644-7329
 Mobile Phone:
 Work Phone:
 Fax:

← **The applicant information displays.**

▼ Contact Addresses

To edit a contact address, click the address link.
 Required contact address type(s): Mailing

Showing 1-2 of 2

Address Type	Recipient	Address	Action
Mailing		1901 s alamo	
Physical		1901 s alamo	

Copy Applicant Contact Information

Applicant Also Known As: **1**
 (Check all that apply)

Authorized Agent:

Escrow Owner:

← **Click a box to the right of your selection.**

Save and resume later | **2** Continue Application >

The system advances to Step 1: User Information > User Information of the application.

Select all *Applicant Also Known As* roles that apply by clicking the corresponding box (#1).

Click Continue Application (#2).

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Escrow Account

1 User Information 2 Review 3 Validate Fees 4 Record Issuance

Step 1: User Information > Application Details * indicates a required field.

Contact List

To add a new contact, click Look Up or Add New button.
To prevent a contact from receiving emails:
New Contact-Click "Do not receive Email Notifications" box
Existing Contact-Click the contact's "Edit" link and then click "Do not receive Email Notifications" box

[Add New](#) [Look Up](#)

Showing 1-1 of 1

Full Name	Business Name	Contact Type	Primary Phone	Work Phone	E-mail	Action
Wren's Rose Flower Shop	Wren's Rose Flower Shop	Escrow Owner	800-644-7329		patricia.rosas@sanantonio.gov	Edit Delete

The Contact List section of Step 1 is shown on this slide. An Authorized Agent for the account may be added here. If so, click Look Up to search for the contact before clicking Add New and creating a new contact. This avoids duplicates in the system.

Application

Application Details

The following Items may be deducted by the City from the Escrow Account for unpaid fees

All fees:

Permits Only:

Re-Inspection fees and Scheduling Fees Only:

Platting fees:

Zoning fees:

No fees may be deducted from the Escrow Account unless authorization from agent or owner is given.:

* Escrow Account Name:

* I authorize all current and future authorized agent contacts established by the owner of this Escrow account to use this account to pay fees to the City of San Antonio.:

[Save and resume later](#) [Continue Application »](#)

Select the items that may be deducted by the city for unpaid fees from the escrow account.

Shown is the Application section (bottom half) of the Step 1 page. Click the corresponding box to select the items that may be deducted from the Account by the city for unpaid fees.

Type a unique name to the Account. Click Continue Application.

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Escrow Account

1 User Information 2 Review 3 Validate Fees 4 Record Issuance

Step 1: User Information > Documents

Attachment

To upload a new document click Add.
The maximum file size allowed is 80 MB
htm;htm;mht;mhtml are disallowed file types to upload.

* indicates a required field.

Name	Type	Size	Latest Update	Action
No records found.				

1 Add

Save and resume later Continue Application »

This record type does not require documentation. Click Continue Application.

**** Click the Save and Resume Later button to put the application on a temporary status and complete the application at a later time.***

Temporary applications display on the My Records tab.

Home Land Development Building Fire
 Dashboard My Records My Account Advanced Search

Escrow Account

1 User Information 2 Review 3 Validate Fees 4 Record Issuance

Step 2: Review

Save and resume later Continue Application »

Please review all information below. Click the "Edit" buttons to make changes to sections or "Continue Application" to move on.

Record Type

Escrow Account

Applicant Edit

Organization
 Wren's Rose Flower Shop
 Primary Phone: 800-644-7329
 E-mail: patricia.rosas@sanantonio.gov
 Do not receive Email Notifications: No

Copy Applicant Contact Information Edit

Applicant Also Known As:

Authorized Agent: No
 Escrow Owner: Yes

Contact List Edit

Showing 1-1 of 1

Full Name	Business Name	Contact Type	Primary Phone	Work Phone	E-mail	Action
Wren's Rose Flower Shop	Wren's Rose Flower Shop	Escrow Owner	800-644-7329		patricia.rosas@sanantonio.gov	Edit

We are in Step 2: Review. Review all information, if changes are needed click the sections corresponding Edit tab.

The system advances to Step 2: Review. Review sections for accuracy.

Application

This is the bottom half of Step 2: Review page.

Application Details Edit

All fees: Yes
Permits Only: No
Re-inspection fees and Scheduling Fees Only: No
Platting fees: No
Zoning fees: No
No fees may be deducted from the Escrow Account unless authorization from agent or owner is given.: No

Escrow Account Name: Wren's Flower Shop
I authorize all current and future authorized agent contacts established by the owner of this Escrow account to use this account to pay fees to the City of San Antonio.: Yes

Attachment Edit

To upload a new document click Add.
The maximum file size allowed is 80 MB
html,htm,mht,mhtml are disallowed file types to upload.

Name	Type	Size	Latest Update	Action
No records found.				

OATH: I swear or affirm that the statements contained in this application, including any attachments and related documents, to the best of my knowledge and belief are true, correct, and complete.
CERTIFICATION: I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application.

1 By checking this box, I agree to the above certification. Date: 09/29/2020

Save and resume later **2** Continue Application »

Scroll to the bottom of the page to read the OATH certification stating all information is true and accurate.

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

Click Continue Application (#2).

The system advances to **Step 3: Record Issuance**. A green banner displays indicating the application is complete. The Escrow Account number displays directly below the green banner (shown). This is the number needed to access the Escrow Account.

WELCOME TO THE CITY OF SAN ANTONIO

CITIZEN ACCESS for SAN ANTONIO

Announcements | Logged in as: Aaron | Collections (0) | Account Management | Logout

Create an Escrow Account | Amend Escrow Account(s) | Search...

Home | Land Development | Building | Enforcement

Create an Application | Search Applications

Escrow Account

1 User Information	2 Review	3 Record Issuance
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Step 3: Record Issuance ←

Your application has been successfully submitted. Please print your record and retain a copy for your records.

Thank you for using our online services.
Your Record ID is ESC-APP-19-00716. ←

You will need this Record ID to check the status of your application or to schedule/check results of inspections. Please print a copy of your record for your files.

Your application has been submitted for review by the City of San Antonio Development Services Department. You may contact the Development Services Department at their offices or by phone.

Cliff Morton Development and Business Services Center
1901 South Alamo Street
San Antonio, TX 78204
Phone: 210.207.1111
Hours: 7:45 am - 4:30 pm (Mon - Fri)
Closed on City Holidays

[View Record Details »](#)

09/29/2020

Create an Escrow Account | Amend Escrow Account(s)

Search...

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Escrow Account

1 User Information 2 Review 3 Validate Fees 4 Record Issuance

Step 3: Validate Fees ←

Application Fees

Fees	Qty.	Amount
No Fee	<input type="text" value="0"/>	\$0.00

TOTAL FEES: \$0.00

Recalculate

Continue Application »

The system advances to Step 3: Validate Fees step.

Creating an escrow account does not carry any fees. Click Continue Application.

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Escrow Account

1 User Information 2 Review 3 Validate Fees 4 Record Issuance

Step 4: Record Issuance

Your application has been successfully submitted.
Please print your record and retain a copy for your records.

1 Thank you for using our online services.
Your Record ID is ESC-APP-20-00056.

You will need this Record ID to check the status of your application or to schedule/check results of inspections. Please print a copy of your record for your files.

Your application has been submitted for review by the City of San Antonio Development Services Department.
You may contact the Development Services Department at their offices or by phone.
Cliff Morton Development and Business Services Center
1901 South Alamo Street
San Antonio, TX 78204
Phone: 210.207.1111
Hours: 7:45 am - 4:30 pm (Mon - Fri)
Closed on City Holidays

2 [View Record Details »](#)

The system progress to Step 4: Record Issuance. The escrow account is now created. Notice Escrow Account record number (#1). Click View Record Details for additional information (#2). Manage the escrow account from your Account Management page.

Managing the Escrow Account

09/29/2020

09/29/2020

In the Account Management page, click the Account ID (#1) to view all transactions and conduct deposits. Click Deposit link (#2) to conduct a deposit using credit card or bank payment.

Announcements | Logged in as: Wren's Rose Flower Shop | Collections (0) | Account Management | Logo

Create an Escrow Account | Amend Escrow Account(s)

Search...

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Manage Your Account

Your current account information is shown below. Click an Edit button to update information within a section.

Account Type

Citizen Account

Login Information

User Name: wren.lanse@michiganrr.com
E-mail: wren.lanse@michiganrr.com

Security Question: Training

Escrow Account Information

Amend Escrow Account(s)

Showing 1-1 of 1 | Export results

Account ID	Agency	Balance	Description	Ledger Account	Action
20-00056	COSA	\$0.00	Wren's Flower Shop		Deposit

Delegates Add a Delegate

Annotation 1: Points to the Account ID '20-00056' in the table.

Annotation 2: Points to the 'Deposit' link in the Action column.

○

Screenshot of the Account ID page. Make deposits by clicking Deposit link (#1).

Dashboard My Records My Account **Advanced Search**

Escrow Account Details

Account ID: 20-00056 Balance: \$0.00
Description: Wren's Flower Shop Status: Active
Ledger Account:
[Deposit](#)

Associated Address

Showing 0-0 of 0

Parcel Number	Lot	Block	Subdivision	Owner	Address
No records found.					

Associated People

Showing 1-1 of 1 | [Export results](#)

First Name	Middle Name	Last Name	Full Name / Org Name	E-mail	Primary Phone
			Wren's Rose Flower Shop	patricia.rosas@sanantonio.gov	800-644-7329

Transactions

Showing 0-0 of 0

Trans ID	Account ID	Trans Type	Trans Amount	Target Account ID	Record ID	Client Trans Number	Client Receipt Number	Office Code	Trans Date	Payment Method	Transaction Code	Cash Drawer ID	Comments	Customized Receipt Number	Reference #	CC Auth. Code	Payor
No records found.																	

Search...

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Please select a payment method and then fill in all required information.
The available payment methods are:

- Credit Card
- Bank Account

* Indicates a required field.

Payment Options

Account ID:
20-00056

* Amount:

Pay with Credit Card or Bank Payment

[Submit Payment »](#)

Screenshot of the Deposit link page.

Amending an Escrow Account

09/29/2020

09/29/2020

To amend Escrow Accounts, after login, click the Amend Escrow Account(s) link (#1) located at the top of your home page. Account number displays (#2). Amendment link (#3).

Announcements | Logged In as: Wren's Rose Flower Shop | Collections (0) | Account Management | Logout

Create an Escrow Account Amend Escrow Account(s)

Search...

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Records

Showing 1-1 of 1 | Export results | Add to collection

<input type="checkbox"/>	Date	Record Number	Record Type	Description	Project Name	Expiration Date	Created By	Status	Action	Short Notes
<input type="checkbox"/>	09/29/2020	ESC-APP-20-00056	Escrow Account				wren.laroe@michiganet.com	Approved	Amendment	

Clicking the Record Number ID takes user to the Record Details page.

Search for Records
Enter information below to search for records.
• Site Address
• Contractor License Information
• Parcel Number
• Record Information
• Contact Information
Select the search type from the drop-down list.

General Search

Application Number: Application Type: Start Date: End Date: Search my records only

Street No.: Street Name: Street Type: Unit/Suite:

City Parcel Number: Project Name:

Search Clear

Please note: Contact the Development Services Department Customer Call Center to create an amendment to add or remove an authorized agent from an Escrow Account. This process is conducted by staff. Kindly call (210)207-1111, M-F, 7:45am to 4:30pm or email [Call Center](#)

Making a Deposit into an Escrow Account

09/29/2020

09/29/2020

Escrow Account Information

[Amend Escrow Account\(s\)](#)

Showing 1-1 of 1 | [Export results](#)

Account ID	Agency	Balance	Description	Ledger Account	Action
20-00056	COSA	\$0.00	Wren's Flower Shop		Deposit

Delegates [Add a Delegate](#)

From Account Management page, scroll to the Escrow Account Information section (shown). Click either Escrow Account Record ID # (#1) or the Deposit link (#2).

Escrow Account Details

Account ID: 20-00056

Balance: \$0.00

Description: Wren's Flower Shop

Status: Active

Ledger Account:

[Deposit](#)

Associated Address

1

If Record ID # link is clicked, the Escrow Account Details page displays (shown). Click Deposit (#1).

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Please select a payment method and then fill in all required information.
The available payment methods are:

- Credit Card
- Bank Account

Payment Options

Account ID:
20-00046

Pay with Credit Card or Bank Payment

1 * Amount:
5000.00

2 Submit Payment »

After Deposit is clicked, the Payment Options page displays (shown). Type Deposit Amount (#1). Click Submit Payment (#2).

The screenshot shows a payment selection screen. At the top, a red header bar is visible. Below it, the question "How would you like to make the payment?" is displayed. Two radio buttons are present: "Credit Card" (selected) and "Bank Payment". A yellow callout box points to these options with the text "Select Credit Card or Bank Payment." Below the radio buttons, a blue-bordered box contains a warning: "3% surcharge will be added to your transaction". Inside this box, three rows of text and input fields are shown: "Payment Amount : \$5000.00", "Service Charge for the Credit Card Processing : \$150.00", and "Total Amount : \$5150.00". A yellow callout box points to this section with the text "Review Information." At the bottom of the screen, two blue buttons are visible: "Continue Payment >>" and "Cancel". A red circle with the number "1" is next to the radio buttons, and another red circle with the number "2" is next to the "Continue Payment >>" button.

1

How would you like to make the payment?

Credit Card Bank Payment

Select Credit Card or Bank Payment.

3% surcharge will be added to your transaction

Payment Amount :

Service Charge for the Credit Card Processing :

Total Amount :

Review Information.

2

Continue Payment >> Cancel

Select Credit Card or Bank Payment (#1). Review Information. Click Continue Payment (#2).

Online Invoice Payments

Payment from credit card

Card Type: 1

Card Number: 2

Expiry Date: 2

Use drop-down arrow to select Card type.

Type Card Information.

After clicking Make Payment, please do not refresh the page or press the back button on your internet browser.

	:	\$5,150.00
Total:		\$5,150.00

3

Use drop-down menu arrow to select card type(#1). Type card information (#2). Click Complete Transaction (#3).

****Note: Development Services Department does not retain credit card information.***

****Credit card information used here is used for example only and fictitious.***

The screenshot shows a web portal with a navigation menu at the top containing 'Home', 'Land Development', 'Building', and 'Fire'. Below this is a secondary menu with 'Dashboard', 'My Records', 'My Account', and 'Advanced Search'. A green banner with a checkmark icon displays the message: 'Deposit to Escrow successful. Please check your email for confirmation.' Below the banner, it says 'Thank you for using our online services.' and 'Now you may go back to trust account detail page to check current information of the trust account.' A red circle with the number '1' highlights a blue link labeled 'Account Management'. Two yellow callout boxes provide instructions: the top one says 'Citizen Access displays a green banner indicating confirmation of deposit.' and the bottom one says 'Click the Account Management link provided to return to your Escrow Information page.'

Click the Account Management link provided(#1) to return to the Escrow Account information page. Scroll to the Escrow Account Information section to view updated balance.

This concludes the Creating an Escrow Account module.



Creating an Escrow Account

09/29/2020

09/29/2020