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Withdrawal & Refund for Escrow Accounts-Land Development

The Withdrawal or Refund Request is an amendment record type that allows an applicant to file a withdrawal and/or refund request for any record submitted in BuildSA. Currently only Land Development records are created in BuildSA with the exception of Garage Sale Permits (coming October 1).

The Withdrawal or Refund Request record is also used to close an Escrow Account and request a refund from that account.
The purpose of this record is for the customer to be able to initiate the request from the ACA portal.

Things to know about Withdrawal and Refund records and Escrow Accounts:

- Only the Escrow Owner may use the Withdrawal and Refund record for Escrow Accounts
- Any balance on an Escrow Account is returned to the Escrow Owner only
  - Approximately 30 days for processing
- Escrow Accounts Only: When selecting Request Type in **Step 2** of the application, do **not** use *Withdrawal/Cancel and Refund* and *Withdrawal/Cancel Only*

Before you begin

1. Gather pertinent information: Citizen Access login information, Original record ID # (parent record), any documents you want to upload (documents must be scanned), etc.

Creating the Withdrawal/Refund Record

1. **Login** to your Citizen Access Account (to register for an account use the following link: https://aca.sanantonio.gov/CitizenAccess/Default.aspx.)
2. **Using** the **My Records** tab, locate and open the Escrow account on which you are the owner.
3. **Scroll** to the bottom of the page that displays (Record Details page). **Click** *Create Amendment*.

Create Amendment

4. **Click** the radio button to the left of <u>Withdrawal or Refund Request</u>. **Click** *Continue Application.*
5. The Application Intake Form displays (**Step 1**) and is pre-populated with the parent record information.

Withdrawal or Refund Request

1 Required Information	2 Application Information	3 Review	4 Validate Fees	5 Record Issuance

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6. **Click** *Continue Application.* **Step 2: Application Information** displays. Complete required fields (# 1 and #2 shown).
7. **Complete** all required fields. Required fields are identifiable with a red asterisk (*).
8. **Click** *Continue Application* (#3 shown).

Escrow Accounts only: Select Close and Refund to close account and request a refund.

Escrow Accounts only: Select Refund only to request a refund but keep the account open.

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If Close and Refund is selected on an Escrow Account, BuildSA displays a confirmation message.

REQUEST TYPE

Please be aware that the closure of your escrow account is permanent and there will be a $50 fee deducted from the account balance to close the account.

What is your request: *   Close and Refund Escrow ▼

* Description of Request: Refund request

❖ *Note: BuildSA assesses a $50.00 fee to close an Escrow Account.*

9. The system advances to the Attachment page of **Step 2**. A red banner displays across the top of the page (#1 shown). To upload documentation, **click** Add (#2 shown).

Home   Land Development   Enforcement

Create an Application   Search Applications

✖ Following documents need to be uploaded: ①
'Request to Close Escrow Letter'

Withdrawal or Refund Request

| 1 Required Information | 2 Application Information | 3 Review | 4 Validate Fees | 5 Record Issuance |

Step 2: Application Information > Documents ⬅

* indicates a required field.

Attachment

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.				

Add ②

Continue Application »   Save and resume later

10. The File Upload screen displays**. Click** Add.

11. Internet Explorer window displays showing your computer drives. **Locate** your Close Escrow Letter. **Double-click** the file to upload to Citizen Access.

12. **Click** Continue. **Click** the required Type drop-down menu (#1 shown). **Click** to select Request to Close Escrow Letter.

13. **Click** Save (#2 shown). Next, **click** *Continue Application* (#3 shown).

14. The system displays a green banner stating the attachments have been successfully uploaded. The attachment displays under the Attachment section. **Click** *Continue Application*.

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15. The system advances to **Step 3: Review**. **Click** the box to the left of the certification acknowledgement. Next, **click** *Continue Application*.

16. System advances to **Step 4: Record Issuance**. A green banner displays when application is successfully submitted. Jot down the record number. You will find the record under the My Records section of your Citizen Access account.

Thank you for using Development Services Department's Citizen Access.