

**Citizen Access  
Online Tutor  
Lesson 2**

**Due to problems when uploading documents,  
the recommended browser is Internet Explorer.**

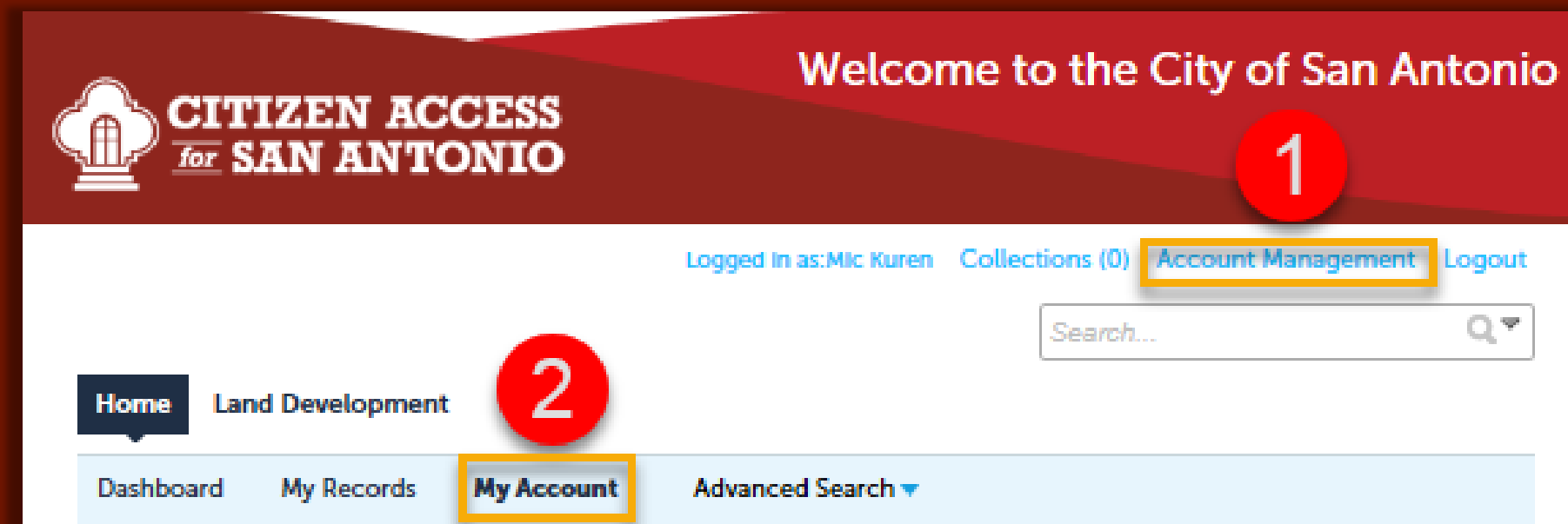


**Before proceeding, login to Citizen Access.**

## Citizen Access Online Tutor Lesson 2

Use the Account Management page to  
view or edit your account information.

### Two ways to access the Account Management page



## Citizen Access Online Tutor Lesson 2

**Edit/View the following sections contained on the Citizen Access**

**Account Management/My Account page:**

- 1. Account Type**
- 2. Login Information**
- 3. Escrow Accounts**
  - 1. View Account Balance(s)**
  - 2. Make Deposits**
- 4. Delegates**

***\* Adding and Removing Contacts is managed at the record level and not on the Account Management page.***

**Access Account Management page by clicking either of two places (#1 or #2 shown).**

**Contacts are managed at the record level.**

The screenshot shows the 'Account Management' page. At the top right, a red circle with the number '1' highlights the 'Account Management' link in the navigation bar. Below the navigation bar, a red circle with the number '2' highlights the 'My Account' link in the secondary navigation bar. The page content includes sections for 'Manage Your Account', 'Account Type', 'Login Information', 'License Information', 'Contact Information', 'Escrow Account Information', and 'Delegates'. Annotations include yellow boxes with arrows pointing to 'Edit Login Information here', 'Not currently in use', 'Contacts are managed in the record.', and 'Add Delegate here'.

Announcements Logged In as: Gordon Park Homes Collections (0) **Account Management** Logout

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

Home Land Development **2**

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

**Edit Login Information here** → Edit

User Name: gparkhomes@gmail.com  
E-mail: gparkhomes@gmail.com  
Password: \*\*\*\*\*  
Security Question: training

#### License Information

**Not currently in use** → Add a License

You may add professional license(s) to your public user account by clicking the Add a License button. Your professional license(s) may need to be validated by the agency before you can use it.

Showing 0-0 of 0

State License #	License Type	Issued On	Expired Date	Status	Action	Country
No records found.						

#### Contact Information

**Contacts are managed in the record.**

Showing 1-1 of 1 | Export results

First Name	Last Name	Business Name	Contact Type	Status	Action
		Gordon Park Homes	Organization	Approved	Actions

#### Escrow Account Information

Amend Escrow Account(s)

Showing 1-9 of 9 | Export results

Account ID	Agency	Balance	Description	Ledger Account	Action
19-00302	COSA	\$500.00	Gordon Park Homes	0040000451	Deposit
19-00303	COSA	\$0.00	Gordon Park Homes 1	0040000451	Deposit
19-00304	COSA	\$5,000.00	Gordon Park Homes2	0040000451	Deposit
19-00474	COSA	\$100.00	Gordon Homes 9	0040000451	Deposit
19-00475	COSA	\$500.00	Gordon Park Homes 10	0040000451	Deposit
19-00476	COSA	\$600.00	Gordon Park Homes 12	0040000451	Deposit

#### Delegates

**Add Delegate here** → Add a Delegate

People who can access my on-line portal account  
None

# Delegate vs Contact

## Delegate

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

## 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**

## Contact

- **View/Add Documents**
- **Request Inspections**
- **Receive Workflow Notifications**
- **Receive Emails**
- **View Application Details**
- **Make Payments**

## 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**

*\*Escrow Accounts-Land development only: Authorized Agents, or Users, differ from Delegate functionality. Please see Escrow Account tutorial.*

**A Delegate is a person authorized by the account owner to view and/or access their account information.**

**If adding a Delegate, the Add a Delegate page displays. A delegate is a person authorized by the account owner to view and/or conduct additional account management based on permissions authorized by the account owner (shown).**

**Add a Delegate** [Close]

Enter the name and e-mail address of the person to whom you would like to grant delegate access to your account.

\* Name  1      \* E-mail Address  2

**Set Delegate Permission**  
*Delegates can view records across all categories unless you choose to restrict them to specific categories.*

**View Records in Land Development** 3      **View is the Default Permission**

*For the following permissions, the available categories are limited to the ones that you have granted the delegate access to view records.*

- Create Applications in Land Development
- Renew Records in Land Development
- Amend Records in Land Development 4
- Manage Inspections in Land Development
- Manage Documents in Land Development
- Make Payments in Land Development

I'm not a robot 5      reCAPTCHA Privacy - Terms

**Addition Permissions**

**Invite a Delegate**



**After locating the record, Add or Remove a Contact to an existing record one of two ways:**

- 1. From the Record's detail page by clicking the Create Amendment link (#1 shown, select Add/Remove)**
- 2. Or, from My Records page (shown) scroll to the right to locate and click Amendment link (#2 shown, select Add/Remove).**

Announcements Logged in as: Gordon Park Homes Collections (0) Reports (3) Account Management Logout

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

Home Land Development

Create an Application Search Applications

Record ZONING-ZV-2019-13300347: Add to collection

Zoning Verification

Record Status: Under Review

Record Info Payments

To view any current activity on this Record, please refresh the page.

san antonio, TX, 78205  
United States

More Details

Create Amendment

Click Create Amendment to select Add/Remove Contact form.

Record Number	Record Type	Description	Project Name	Expiration Date	Created By	Status	Action
NG-ZV-13300347	Zoning Verification				gparkhomes@gmail.com	Under Review	Amend



**Please contact the DSD Call Center (210)207-1111,  
M-F 7:45am to 4:30pm with any questions or email  
[CallCenter@sanantonio.gov](mailto:CallCenter@sanantonio.gov)**

**Citizen Access  
Online Tutor  
Lesson 2**

**This concludes Citizen Access Online Tutor  
Lesson 2 Account Management**

