Before proceeding, login to Citizen Access.

Due to problems when uploading documents, the recommended browser is Internet Explorer.
Use the Account Management page to view or edit your account information.

Two ways to access the Account Management page

1. [Screen capture of the Citizen Access for San Antonio website with the Account Management link highlighted.]

2. [Screen capture of the My Account section with the Account Management link highlighted.]
Edit/View the following sections contained on the Citizen Access Account Management/My Account page:

1. Account Type
2. Login Information
3. Contact Information
4. Delegates
# 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
Manage Your Account
Your current account information is shown below. Click an Edit button to update information within a section.

Account Type

Login Information

Edit Login Information here.

License Information

Contact Information

Showing 1-1 of 1

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Business Name</th>
<th>Contact Type</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patricia</td>
<td>Rosas</td>
<td>Individual</td>
<td>Approved</td>
<td>Actions</td>
<td></td>
</tr>
</tbody>
</table>

Trust Account Information

Showing 0-0 of 0

<table>
<thead>
<tr>
<th>Account ID</th>
<th>Agency</th>
<th>Balance</th>
<th>Description</th>
<th>Ledger Account</th>
<th>Action</th>
</tr>
</thead>
</table>

No records found.

Delegates

Add a Delegate
To add additional contact addresses, click Actions down arrow then click View.
If adding an additional Contact, the Select a Contact Type page displays.
Select Individual or Organization.
Complete required fields in Contact Information page.
Click Add Additional Contact Address.
The Contact Address Information page displays. Select Address Type. Complete required fields. Click *Save and Close* or *Save and Add Another* to add an additional Contact.
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.
This concludes Citizen Access Online Tutor Lesson 2 Account Management