Before proceeding, login to Citizen Access.

Due to problems when uploading documents, the recommended browser is Internet Explorer.
Two ways to access the Account Management page

1. Click on the Account Management link.
2. Select My Account.
A Delegate is an individual authorized by an account owner to view and/or access and manage their records. In addition to viewing records across all categories, the account owner may authorize a delegate to do the following categories from the account owner’s account.

- Create Applications
- Renew Records
- Amend Records
- Make Payments
- Manage Documents
- Manage Inspections
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
- 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
From the Account Management page, click the blue Add a Delegate button. 

Note: Clicking the My Account tab takes user to Account Management page.
The Add a Delegate page displays.

<table>
<thead>
<tr>
<th>Number</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Type name of person</td>
</tr>
<tr>
<td>2</td>
<td>Type email of the person—email address is what links the Delegate to the Account Owner’s account.</td>
</tr>
<tr>
<td>3</td>
<td>Viewing Records across all categories is the default privilege.</td>
</tr>
<tr>
<td>4</td>
<td>To allow additional privileges, check the box to the left of a permission.</td>
</tr>
<tr>
<td>5</td>
<td>Click the box to the left of <em>I’m not a robot</em> security code</td>
</tr>
<tr>
<td>6</td>
<td>Click Invite a Delegate</td>
</tr>
</tbody>
</table>
To return to the Account Management page without selecting a Delegate, click the ‘x’ located in the upper right-hand corner of the page.
Citizen Access returns to Account Management page. Note: Delegate is listed in Delegates section. Click View Invitation to view details.
Invitation Details

#1 shows Delegate name, email and invitation date.

#2 allows account owner to make changes to permissions. If changes are made, click blue Save Changes button.
Sample email received by Delegate is shown above. Delegate must be a Citizen Access account owner and shall login to his/her account to accept or reject the request.

Delegate accepts or rejects invitation from the Account Management page, Delegate section.
Manage your Delegates from your Account Management page.
To view, edit or remove a delegate, click the appropriate option from the Actions drop-down menu.
This concludes Citizen Access Online Tutor
Lesson 3 Delegates