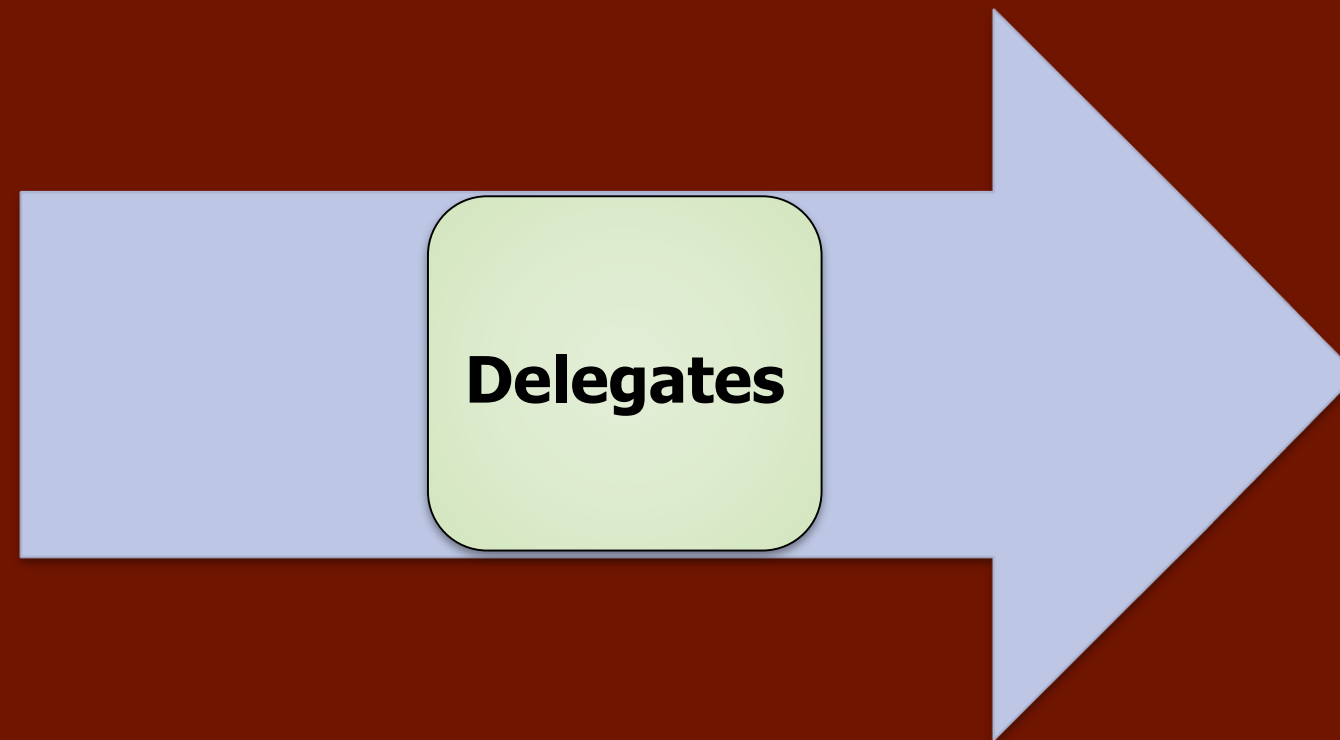


**Citizen Access  
Online Tutor  
Lesson 3**

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

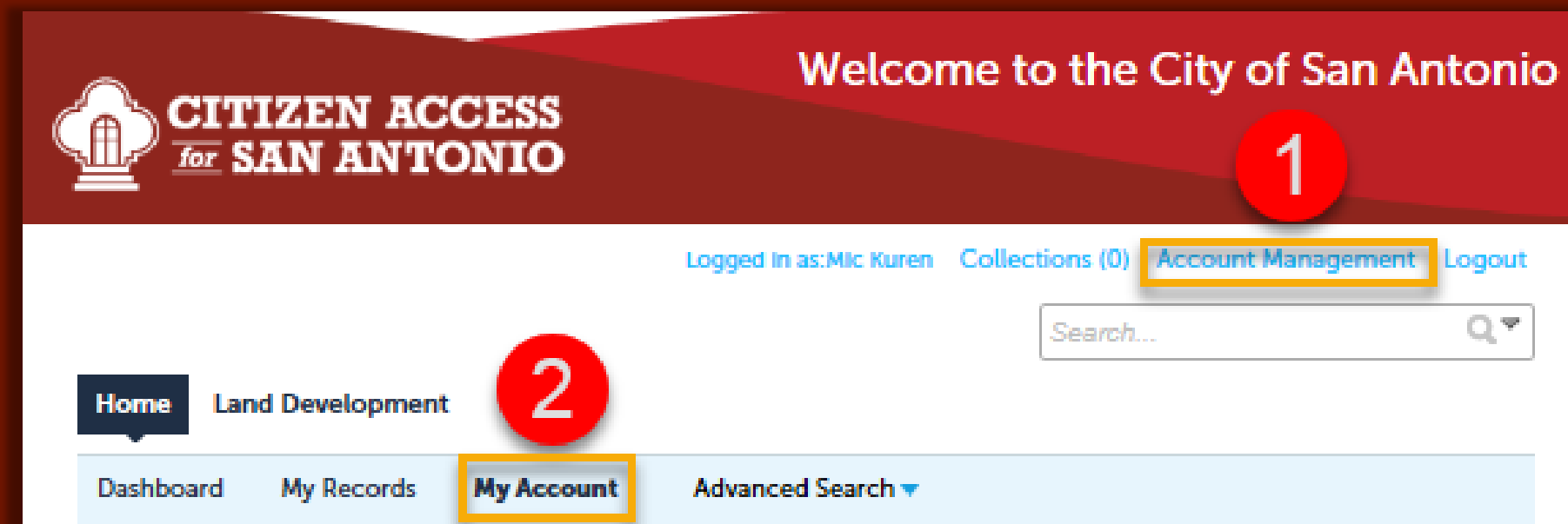


**Before proceeding, login to Citizen Access.**

## Citizen Access Online Tutor Lesson 3

Use the Account Management page to  
Add or Delete Delegates.

### Two ways to access the Account Management page



**Citizen Access  
Online Tutor  
Lesson 3**

**A Delegate is an individual authorized by an account owner to view or access and manage their records. In addition to viewing records across all categories, the account owner may authorize additional permissions for the delegate(s). Multiple delegates may be added to an account by the account owner-each may have specific permissions.**

**Create Applications**

**Renew Records**

**Amend Records**

**Make Payments**

**Manage Documents**

**Manage and request Inspections**

# **Escrow(s) Accounts Only Information**

**The Authorized User (s), or Agent (s), functionality used in Escrow Accounts by Escrow Account owners differs from the Delegate functionality.**

- In Escrow Accounts, Authorized Agent(s) or User(s) are authorized by the Escrow Owner to view the escrow account in the Citizen Access portal and deposit funds into the account. The Authorized Agent is able to use the account to pay fees to the City.**

# 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 link located at the bottom of the Account Management page (shown).**

The screenshot shows the 'Account Management' page for a user logged in as 'Gordon Park Homes'. The page has a navigation bar with 'Home' and 'Land Development' tabs, and a sub-navigation bar with 'Dashboard', 'My Records', 'My Account', and 'Advanced Search'. The main content area is titled 'Manage Your Account' and includes sections for 'Account Type', 'Login Information', 'License Information', 'Escrow Account Information', and 'Delegates'. The 'Delegates' section at the bottom has a yellow arrow pointing to a blue 'Add a Delegate' button.

**Account Management**

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

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

**Home** | Land Development

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](#)

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

#### License Information

[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.						

#### Escrow Account Information

Amend Escrow Account(s)

Showing 1-9 of 9 | [Export results](#)

Int ID	Agency	Balance	Description	Ledger Account	Action
1302	COSA	\$500.00	Gordon Park Homes	0040000451	<a href="#">Deposit</a>
1303	COSA	\$0.00	Gordon Park Homes 1	0040000451	<a href="#">Deposit</a>
1304	COSA	\$5,000.00	Gordon Park Homes2	0040000451	<a href="#">Deposit</a>
1475	COSA	\$500.00	Gordon Park Homes 10	0040000451	<a href="#">Deposit</a>
1476	COSA	\$600.00	Gordon Park Homes 12	0040000451	<a href="#">Deposit</a>

#### Delegates

[Add a Delegate](#)

People who can access my on-line portal account

None

### Add a Delegate ×

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

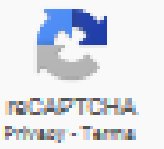
*Delegates can view records across all categories unless you choose to restrict them to specific categories.*

View Records in Land Development 3 Default

*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
- Manage Inspections In Land Development
- Manage Documents In Land Development
- Make Payments In Land Development

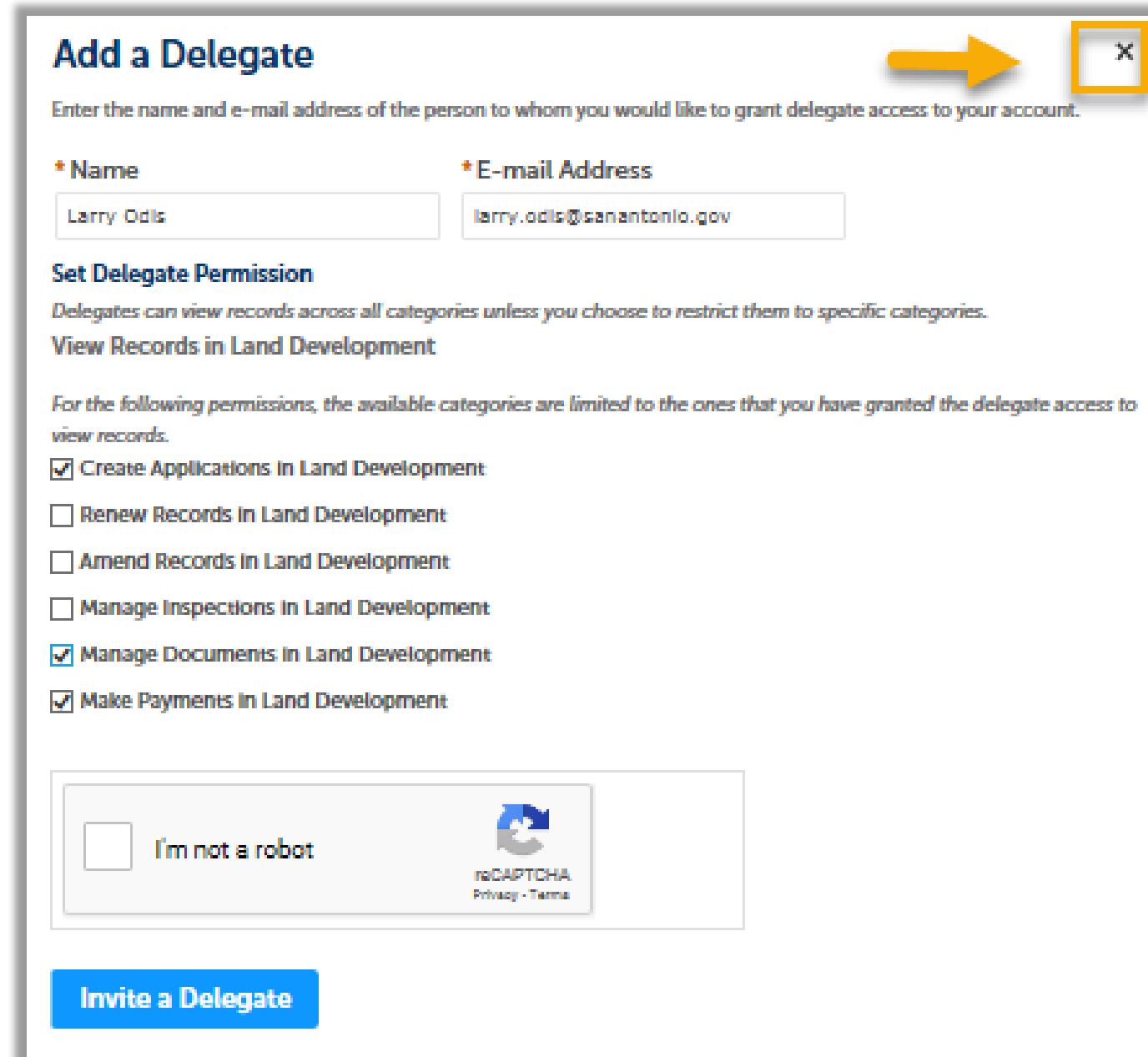
4 Additional privileges.

I'm not a robot 5 

6 Invite a Delegate

**The Add a Delegate page displays.**

Number	Action
1	Type name of person
2	Type email of the person—email address is what links the Delegate to the Account Owner’s account.
3	Viewing Records across all categories is the default privilege.
4	To allow additional privileges, check the box to the left of a permission.
5	Click the box to the left of <i>I’m not a robot</i> security code
6	Click Invite a Delegate



**Add a Delegate**

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

\* Name  \* E-mail Address


**Set Delegate Permission**

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

**View Records in Land Development**

*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
- Manage Inspections in Land Development
- Manage Documents in Land Development
- Make Payments in Land Development

I'm not a robot   
reCAPTCHA  
Privacy - Terms

[Invite a Delegate](#)

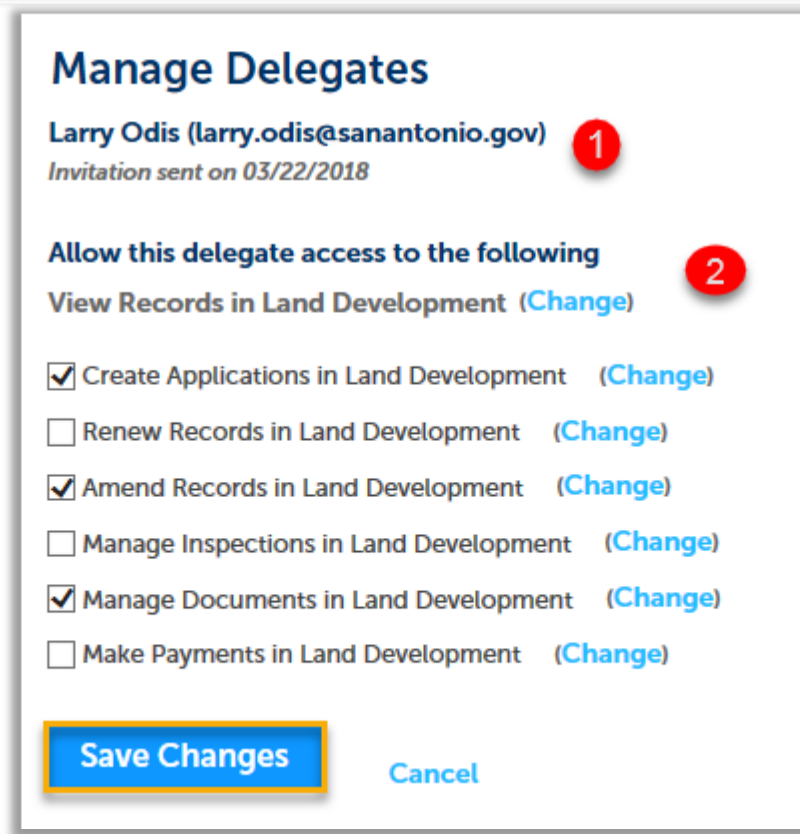
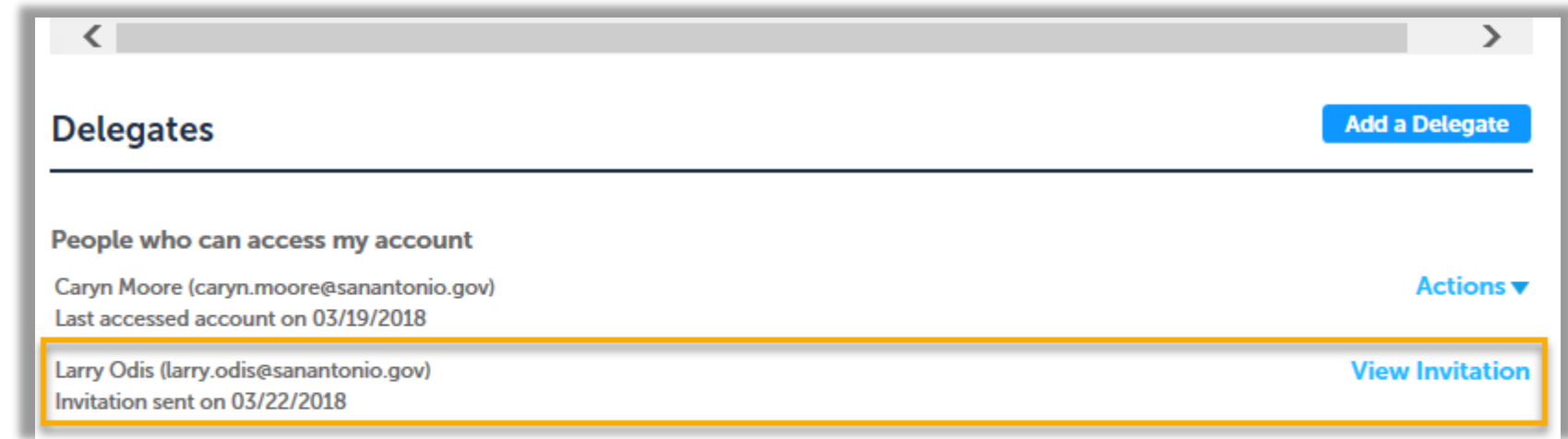
**To return to the Account Management page without selecting a Delegate, click the 'x' located in the upper right-hand corner of the page.**



**Citizen Access  
returns to  
Account  
Management  
page. Note:  
Delegate is  
listed in  
Delegates  
section. Click  
View Invitation  
to view details.**

The screenshot shows the 'CITIZEN ACCESS for SAN ANTONIO' website. At the top right, it says 'Welcome to the City of San Antonio'. The user is logged in as 'Patricia Rosas'. There are links for 'Collections (4)', 'Account Management', and 'Logout'. A search bar is present. The main navigation includes 'Home' and 'Land Development'. Below that is a secondary navigation with 'Dashboard', 'My Records', 'My Account', and 'Advanced Search'. The 'Manage Your Account' section contains a message: 'Your current account information is shown below. Click an Edit button to update information within a section.' Under 'Account Type', it shows 'Citizen Account'. The 'Login Information' section has an 'Edit' button and lists: User Name: pr16000, E-mail: patricia.rosas@sanantonio.gov, Password: \*\*\*\*\*, and Security Question: First grade school attended. Below this is 'License Information'. The 'Delegates' section has an 'Add a Delegate' button and a table of delegates. One delegate, Larry Odlis (larry.odlis@sanantonio.gov), is highlighted with a yellow border, and a 'View Invitation' link is visible next to it. The invitation was sent on 03/22/2018.

After clicking View Invitation, see 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.





Thu 8/16/2018 9:43 AM

Auto\_Sender@Accela.com

Appoint A Public User as A Delegate of Another Public User

To Veronica Hernandez (DSD)

Dear Veronica Hernandez

pr16000 would like to add you as a delegate to their Citizen Access account.

"

As a delegate, you will be able to create application, manage inspection and documents, renew and amend records, and make payments on the behalf of pr16000, based on the permission that have been granted to you.

Please log into your Citizen Access account and access to the **Account Management > Delegates** to accept or reject the request.

**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.**

## Delegates

Add a Delegate

### People who can access my account

Veronica Hernandez (veronica.hernandez@sanantonio.gov)

Last accessed account on 08/16/2018

[Add a Delegate](#)

### People whose account I can access

patricia.cavazos@sanantonio.gov (patricia.cavazos@sanantonio.mil)

Last accessed account on 08/17/2018

Ursula (ursula.perez3@sanantonio.gov)



Actions ▾

View Permissions

Edit Permissions

Remove

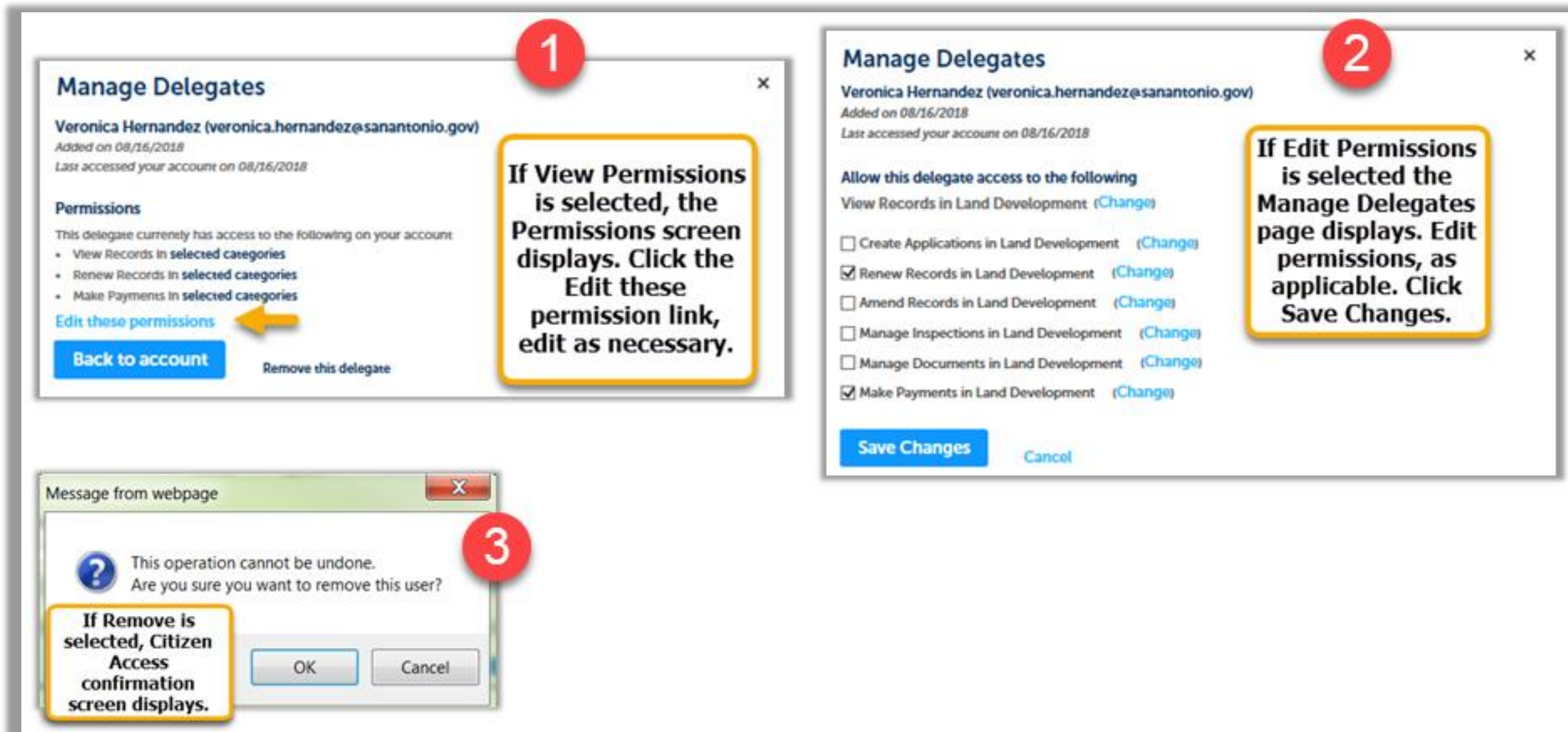
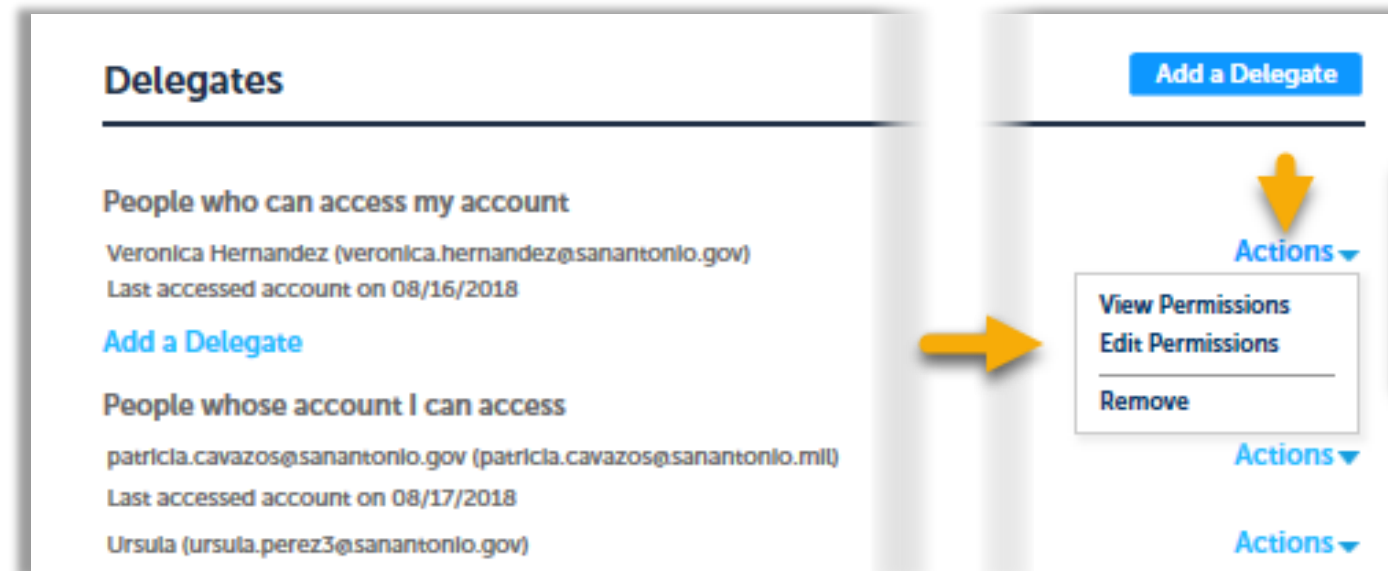
Actions ▾

Actions ▾

**Managing your Delegates is performed in the Account Management page.**

**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.





**Please contact the DSD Customer Call Center with questions,**

**(210) 207-1111**

**M-F, 7:45am to 4:30pm**

**[Email: CallCenter@sanantonio.gov](mailto:CallCenter@sanantonio.gov)**

**Citizen Access  
Online Tutor  
Lesson 3**

**This concludes Citizen Access Online Tutor  
Lesson 3 Delegates**

