

# **Delegate or Contact**

## ***What is the Difference?***

# DELEGATE

**A Delegate is an individual authorized by a Citizen Access account owner to view and/or access their records using the Citizen Access portal. Delegates must also be Citizen Access registered account owners. In addition to viewing record information, delegates may be authorized to perform, from the account owner's account, any or all of the following actions:**

- **Create Applications**
- **Renew Records**
- **Amend Records**
- **Request Inspections**
- **Manage Documents**
- **Make Payments**

# **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.**

**Manage Delegates from your Account Management page. Click Account Management hyperlink to access page (#1 shown). Scroll to Delegates section of page. To add a Delegate, click *Add a Delegate* (#2 shown). Managing Delegates includes: Adding, Viewing, Editing or Removing.**

Welcome to the City of San Antonio

**CITIZEN ACCESS for SAN ANTONIO**

Announcements Logged in as: glambert@gmail.com Collections (0) **Account Management** Logout

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

Home Land Development Building Enforcement

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

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#### Amend Escrow Account(s)

Showing 1-3 of 3 | Export results

Account ID	Agency	Balance	Description	Ledger Account	Action
<a href="#">1411900054</a>	COSA	\$129,952.00	JC Escrow Account		<a href="#">Deposit</a>
<a href="#">1411900089</a>	COSA	\$5,000,000.00	COSAAAAAA	0000500271	<a href="#">Deposit</a>
<a href="#">1411900102</a>	COSA	\$25,000.00	Patty's Treasures	0000500271	<a href="#">Deposit</a>

< >

#### Delegates

**2** [Add a Delegate](#)

People who can access my account

Jaclyn Corona (jaclyn.corona@sanantonio.gov)  
Invitation sent on 05/29/2019 [View Invitation](#)

[Add a Delegate](#)

People whose account I can access

None

- **A Contact is an individual or an organization with whom the account owner is in partnership with on specific projects.**
  - **A contact may be an engineer, a property owner or a company.**
  - **Contacts may be used for a single project or for multiple projects.**
  - **Contacts are managed at the record level. The account owner may add or remove contact(s) on a record.**
- **Unlike a delegate, a contact has limited access to records and only for the following actions.**
  - **Receive Workflow Notifications**
  - **Request to schedule Inspections**

**Contacts are managed at the record-level. This means Contacts may be added while creating an application in Step 2 of the application creation process (shown); or, after the application is created by using the record's the Add/Remove Contact amendment.**

The screenshot shows the 'CITIZEN ACCESS for SAN ANTONIO' website. The user is logged in as 'Gordon Park Homes'. The navigation menu includes 'Home', 'Land Development', 'Create an Application', and 'Search Applications'. A yellow arrow points to the 'Contact Information' step in the 'Zoning Verification' process. Below this, the 'Step 2: Contact Information > Contacts' section is highlighted, containing instructions and a 'Contact List' table. A yellow box highlights a callout: 'Look Up a contact before Adding a New contact to avoid duplication of contacts in the system.' The 'Contact List' table shows one contact: Gordon Park Homes, Recipient, 210-207-0000, gparkhomes@gmail.com. At the bottom, there are buttons for 'Continue Application »' and 'Save and resume later'.

Welcome to the City of San Antonio

CITIZEN ACCESS for SAN ANTONIO

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

Zoning Verification

1 Property Information 2 Contact Information 3 Application Information 4 Document Information 5 Review 6 7

Step 2: Contact Information > Contacts

If paying by "Escrow", please ensure the "Escrow Owner" is listed on the application. If you are authorized to use this Escrow Account, please ensure you are listed as an "Authorized Agent".

\* indicates a required field.

Contact List

To add or edit your Contacts demographic information, go to your Account Management page.  
After adding the contact to your application, if you wish for one of them to opt-out of receiving emails, please make this selection within each contact by using the Edit button next to those specific contacts.

Add New Look Up

Look Up a contact before Adding a New contact to avoid duplication of contacts in the system.

Showing 1-1 of 1

Full Name	Business Name	Contact Type	Primary Phone	Work Phone	E-mail	Action
Gordon Park Homes	Gordon Park Homes	Recipient	210-207-0000		gparkhomes@gmail.com	Edit Delete

Continue Application » Save and resume later

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**Add a Contact to an existing record one of two ways:**

**From the Record's detail page by clicking the Create Amendment link (#1 shown);**

**or, locate Record using the My Records tab, scroll to the right to locate and click Amendment link (#2 shown).**

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

1

Click Create Amendment to select Add/Remove Contact form.

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

Land Development

Results | Add to collection

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

Profile

Amendments

2

Locate Record using My Records tab, scroll to the right. Click Amendment (#2 shown).

# 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**

## 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**



**Please contact the DSD Customer Call center,  
(210)207-1111 with any questions (M-F, 7:45am to  
4:30pm).**