

Delegate or Contact

What is the Difference?

DELEGATE

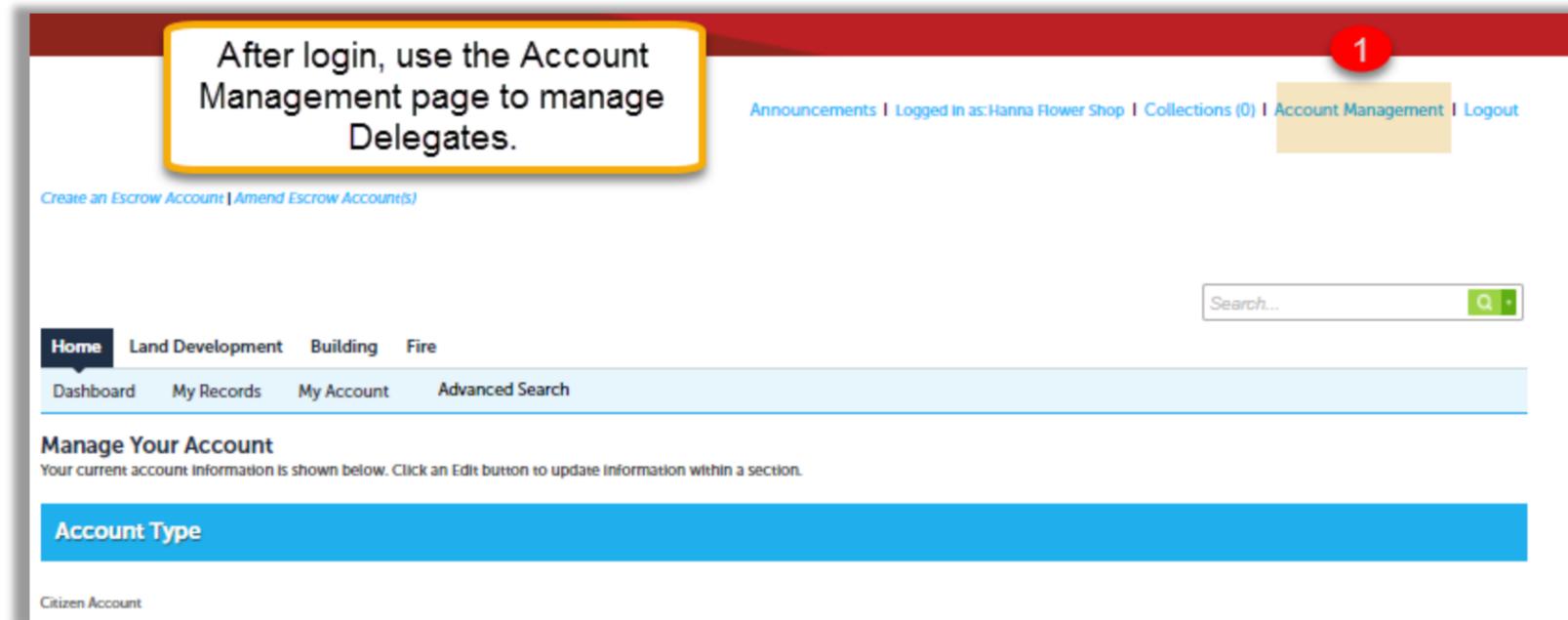
A Delegate is an individual authorized by a Citizen Access account owner to view and/or access their records using the Citizen Access portal. Delegates must also be Citizen Access registered account owners. In addition to viewing record information, delegates may be authorized to perform, from the account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

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

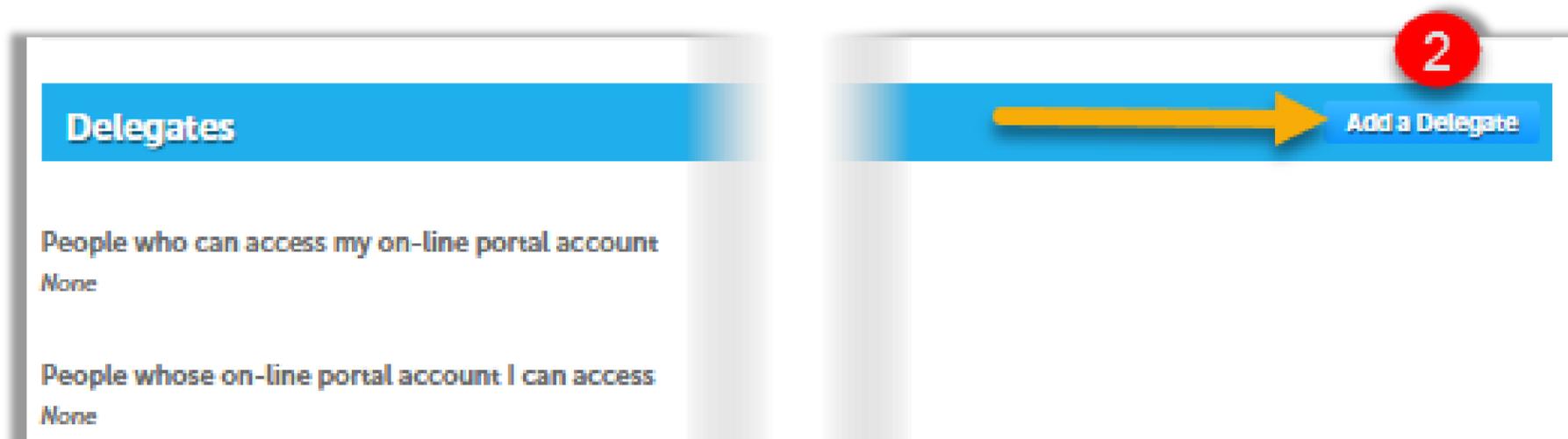
Escrow(s) Accounts Only Information

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/Add Delegates from your Account Management page (#1). Scroll to Delegates section at the bottom of the page (#2). To add a Delegate, click *Add a Delegate* (#2). Managing Delegates includes: Adding, Viewing, Editing or Removing.



- **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.**

Home Land Development **Building** Fire

Search Applications Create an Application **1**

Commercial Project Application

1 Property Information 2 Contact Information 3 Application Information 4 Review 5 Validate Fees 6

Step 2: Contact Information > Contact List * Indicates a required field.

Contact List

To add a new contact, click Look Up or Add New button.
To prevent a contact from receiving emails:
New Contact-Click "Do not receive Email Notifications" box
Existing Contact-Click the contact's "Edit" link and then click "Do not receive Email Notifications" box

Required Contact Type Minimum
Company Name/Business Owner1

Add New **Look Up** **2**

Showing 0-0 of 0

Full Name	Business Name	Contact Type	Primary Phone	Work Phone	E-mail	Action
No records found.						

Licensed Professional

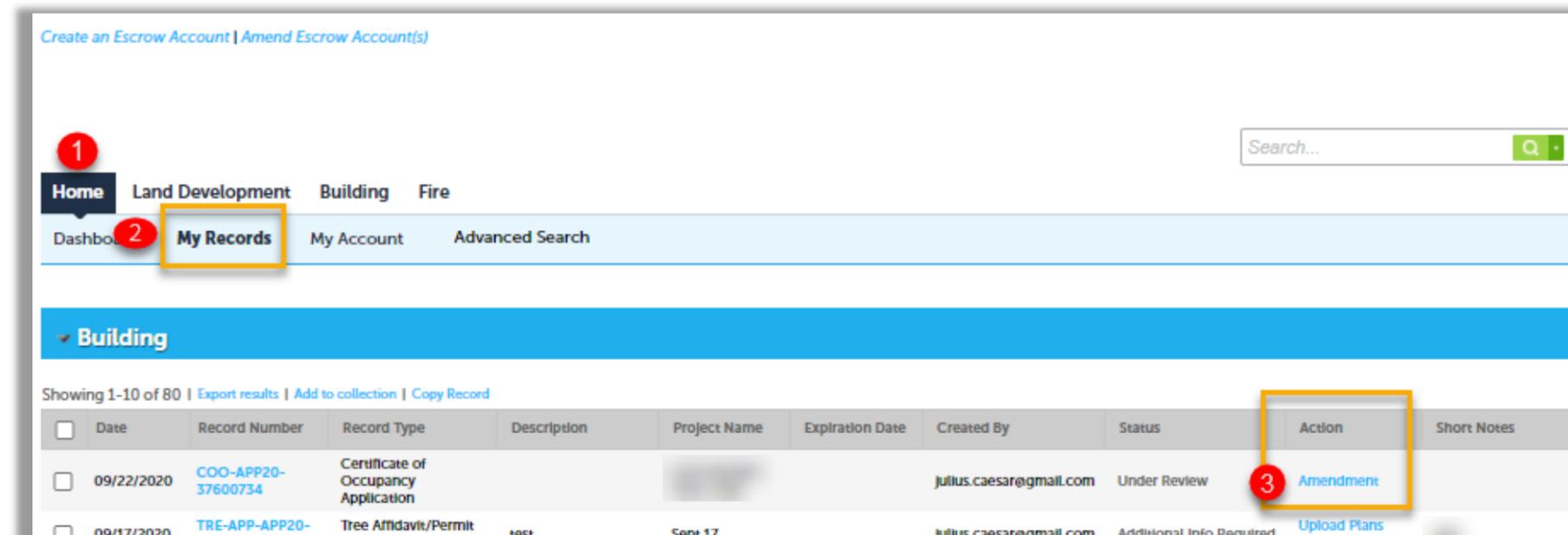
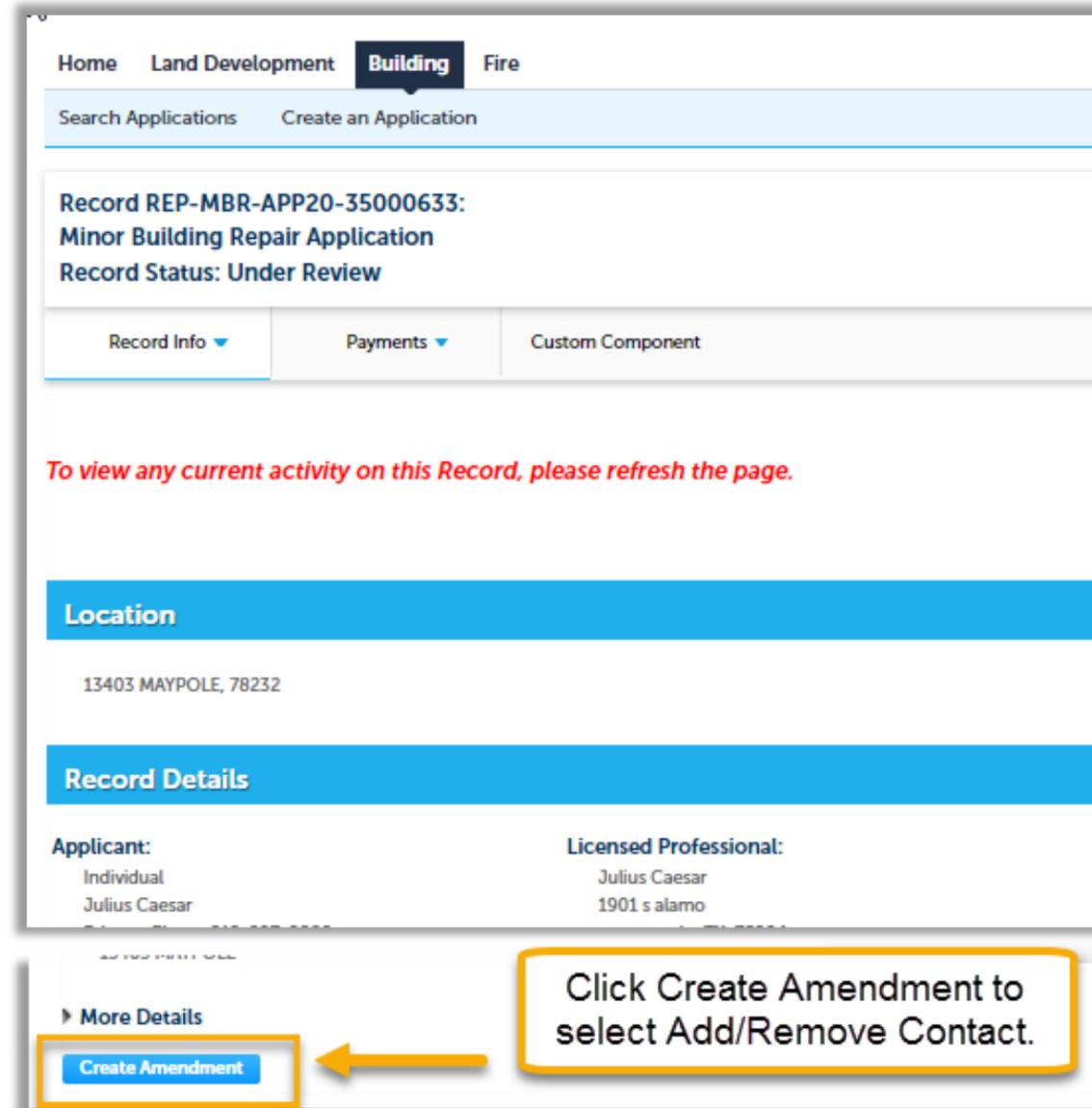
To add a new licensed professional, click the Select from Account or Add New button. To edit a licensed professional, click the Edit link. To find a licensed professional, click the Look Up button.

Look Up

Look Up a Contact before Adding a New contact to avoid duplicates in the system.

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 the Record using Home > My Records > Amendment link (#2).



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 about Delegates
or Contacts on an application or record (M-F,
7:45am to 4:30pm).**