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## Document Control

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Overview

Welcome to Citizen Access!

The City of San Antonio’s Development Services Department is pleased to offer our customers a higher level of customer service using online access to our services, 24 hours a day and 7 days a week. Citizen Access is a web-based program displaying real-time information stored in the City of San Antonio’s Development Services Department database.

Citizen Access enables our customers to research and apply for permits, pay fees and obtain other planning and development information through a single website. It is truly a one-stop site for all of our customers’ needs. This effort supports our commitment to our customers in providing transparency in the delivery of our services.

Following is a list of some of the services that Citizen Access offers to our customers:

- Submit and update Information
- Pay Fees Online
- Request Inspections
- Track Status of Applications
- Print Final Records

User Guide

This guide is meant to help our customers use Citizen Access and create their own personal account. Our customers also have the option to look up Property Information and search for Records/Applications without creating a user account. Instructions for using this option are included in this guide.

Access to the guide online: http://www.sanantonio.gov/DSD/BuildSA/Training. If you have questions or need help accessing Citizen Access, please call the BuildSA Customer Call Center at 210-207-1111 (select Option 5). The BuildSA Customer Call Center is available M-F, 7:45am to 4:30pm.

Online Services Support

buildsaocmteam@sanantonio.gov
**BuildSA Self-Service Center**

A BuildSA Self-Service Center is located directly outside of the Land Development area. The BuildSA Self-Service Center contains a scanner and a computer for customer use. Create Accounts, Create Applications, Look up Record Statuses, Upload Documents or Request Inspections all from this location.

Thank you again for your continued business with the City of San Antonio and support as we improve our computer systems to serve you, as well as all of our customers, better.

**Let’s get started**

- While using your computer ensure that you *Allow Pop-ups from This Site*. Allowing pop-ups ensures that vital forms display for your use.
- Accept General Disclaimer(s) when they display.

**Non-Registered Users**

**Look-up Property Information without Creating an Account**

Three different locations (options) are available on the Citizen Access portal to search for Property Information without creating an Account.

*All viewers* of the site have access to view *Property* and *Record/Application* information whether they’ve created an account. Viewers may search by address, parcel, owner or record/application records.

The links to access this information are located in several locations on the General Greeting and Information page (shown).

**The First Option—Advanced Search Tab**

1. From the General Greeting and Information page, **hover** over the words *Advanced Search* (shown). A drop-down menu appears with two options: *Lookup Property Information* and *Search Records/Applications* (shown).
2. **Click** either Lookup Property Information or Search Records/Applications.
The Second Option - General Information

Now, let’s look at the second location (option) where customers may access information.

1. **Navigate** to the bottom of the General Greeting and Information Page to the General Information area (shown).
2. **Click** on the Lookup Property Information hyperlink (shown).
3. The Look Up Property Information page displays (shown). Look up property information by Address, Parcel Information or Owner (#1 shown below). **Complete** fields.

4. **Click** Look Up (# 2 shown above). Information requested will display.

   ❖ **NOTE: If the exact address is not known, a range may be entered, for example:**
The Third Option—Land Development

Now, let’s look at the third location (option) where customers may access information.

1. **Navigate** to the bottom of the General Greeting and Information Page to the Land Development area (shown).
2. **Click** on the Search Applications hyperlink (shown).
3. Search by Application Number, Application Type, Address, Parcel or Contact (shown).
Clicking any of these areas shown takes the user to a Search page. The following section of this guide explores the various searching options.

**Search by Property Information**

Searching **Property Information** by **Address, Parcel Information** or **Look Up by Owner** (#1 shown).
1. Click on the drop-down menu arrow. **Click** to select **Look Up by Address** (shown).

2. If **Look Up by Address** is selected, fields for **Street Number**, **Street Name**, **Street Type**, **Unit/Suite** and **Zip Code** display.

3. **Complete** the fields with any information you have.
   - If you are not certain of the exact **Street Number**, you may enter a street number approximation, for example, 100-110.

4. **Click** **Look Up**.
   - Clicking the **Clear** button clears all information typed.

5. **Citizen Access** returns all matches found in the database (shown). Clicking on an address hyperlink displays **Address Detail** information (shown).
6. **Click** the address hyperlink (blue text) of the property address. The detail property information displays (shown).
**NOTE: Blue Text identifies hyperlinks. Clicking on a hyperlink displays another page or more details and information about the Record.**

When a match is not found, **Citizen Access** displays the message shown. You have the option to search for the property by another option listed on the drop-down menu.

![Notice: Your search returned no results. Please modify your search criteria and try again.]

> **NOTE:** The **arrow symbol pictured below is the symbol that Citizen Access uses to indicate a Drop-down menu. A drop-down menu is a list of items that appear when clicking on the button.**

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**Search by Owner**

1. **Click** on **Look Up by Owner** (shown). A field for the **Owner Name** displays.
2. **Complete** the name field with any information you have.

![CITIZEN ACCESS for SAN ANTONIO]

> **NOTE:** The **Owner Name information must be typed exactly as it is on the record.**
3. **Click** the *Look Up* button to search for the Owner. Clicking on the Clear button clears information typed.

4. **Citizen Access** returns all matches found in the database (example shown). Blue text indicates hyperlinks. Clicking on the hyperlinks displays Owner Detail Information.

5. **Click** the name of the owner (your selection) to view information.
Note: If numbers display at the bottom of the page, they indicate additional pages of owner listings. Click on the Next tab to navigate from one page of results to another. Click on the Previous tab to return to a page. You may also click on a certain page number.

The name of the owner is in blue text, indicating a hyperlink. The Retrieve Parcel & Address Info is in blue text, too, indicating a hyperlink. Click on the Name hyperlink to display Owner Details (shown). Click on the Retrieve Parcel & Info to display Parcel Detail information if a parcel exists for the Owner (shown).

Search by Parcel

Customers may also search for property information by parcel number.

1. Click on Look Up by Parcel Information from the drop down menu. The fields for the City Parcel Number and County Property ID display (shown).
2. Type the City Parcel Number and the County Property ID fields with any information you have.
3. **Click** the *Look Up* blue button to search for the property. Clicking on the *Clear* blue button clears information you have typed.

4. *Citizen Access* returns all matches and any associated parcels (shown).

5. **Click** on the *Parcel Number* hyperlink to display the Parcel Details page (shown).
The Parcel Details page displays (shown).

6. To view **Address and Owner Information** click the **Retrieve Address & Owner Info** button from the Look Up Property Information page (shown).
7. **Click** the *Address* hyperlink to display the Address Information page (shown).
IMPORTANT: Customers must create an account to pay fees online.

If a page displays scroll bars on its side or bottom, simply click on the arrows to move the page from side to side or up and down, depending on which side of your screen the scroll bar(s) appear.

Create a User Account

Welcome to Citizen Access-- no waiting lines or time restraints!

Creating a user account allows customers to submit their requests to Development Services Department as well as make payments or view payment history from the convenience of their homes or office. Citizen Access provides customers with a higher level of service, available 24/7, making doing business with the City of San Antonio a convenient and user-friendly experience.

NOTE: If you have difficulty viewing the system, please make sure that the internet browser you are using is compatible with the system. Compatible internet browsers include:

- Microsoft Internet Explorer 10 and 11
- Firefox 32
- Safari 6 in Mac OS x 10.8
- Opera 24, and
- Google Chrome 37

Step 1 of the Account Registration process

To create a user account

1. Open web browser and navigate to www.sanantonio.gov.
2. Click on Development Services Citizen Access. The Customer Portal page displays (shown). This page contains resources to help users navigate Citizen Access.
3. Click on either location (#1 or #2 screenshot shown).

4. The Account Registration page displays (shown).
   - Review the terms listed on the Privacy Policy and Disclaimer (shown). Terms must be accepted to continue (#1 shown).
   - Click on the box to the left of I have read and accepted above terms (#2 shown).
   - Click Continue Registration (#3 shown).
NOTE: Fields are the empty boxes or spaces that display on a page. Type required information in these boxes or spaces. Required fields are identified by a red asterisk (*). A Required Field means that specific information must be typed or selected before the user may proceed.

Step 2 of the Account Registration Process

After acceptance of the disclaimer terms, the User Login Information page displays (shown).
1. Required fields are identifiable with a red asterisk (*). All the fields on this page are required fields. **Complete** all fields.

   **Tip: The email address on this page is used for Password Recovery.**

2. The **Contact Information** section of the page must be completed before continuing (shown).
3. **Click** the Add New button (shown).
   a. Enter your Contact information—if creating the account as an **Individual**. The Contact, unless chosen otherwise, becomes the Applicant when creating new applications.
b. If creating the account as an **organization**, type the Contact information based on your organization’s business requirements.

4. **Citizen Access** displays a **Select Contact Type** dialog box (shown). Click on the drop-down menu arrow. Click to select Individual or Organization (account).

5. Click **Continue**. Note: Clicking **Discard Changes** clears the dialog box and **Citizen Access** returns to the **Login Information** page.

   ❖ **NOTE:** If **Organization** is selected, the First and Last name fields are not accessible (shown).
NOTE: Citizen Access’ pages display question mark hyperlinks called Tool Tips, if there is information available to help the user (shown). Click on the Tool Tip to review information (#1) and click on the X (#2) to close the text box (shown).

NOTE: This section must be completed. Not completing this section does not allow user to continue. Citizen Access displays the error message below:
6. After clicking Continue, the Contact Information page displays (shown). Complete all required fields.

- **IMPORTANT:** A Mailing and a Physical address are required—even if the addresses are both the same. At this time, enter the addresses one at a time.
Tip: The email typed on this page is the email address that receives all record (application) notifications. Ensure it is an email address that is monitored frequently.

7. Click Add Additional Contact Address (shown). Type a Physical and a Mailing address (shown).
   
   a. An Additional Contact may be an Engineer, Property Owner, etc.

8. Click Continue Registration (shown).
9. **Citizen Access** displays a *Your account is successfully registered* message (shown).
10. Write down the user name and password you've just created. Keep them handy and ready for use to login to your Citizen Access account in the future.

11. Click Login Now to access your account.

Delegate vs. Contact

A Delegate is a person authorized by the account owner to view and/or access their account information. In addition, the account owner may authorize a delegate to do the following categories from the account owner’s account.

- Create Applications
- Renew Records
A **Contact** is an individual or an organization that the account owner partners with on projects. A contact can be an engineer, a property owner or a company. A contact can be used on a single project or on multiple projects. The account owner can add or delete a contact from their Account Manager or on a record.

Unlike a delegate, a contact has limited access to records only.

- Receive Notifications
- Request Inspections
- Make Payments

**Forgot Your Password? Reset Your Password?**

*NOTE: Should you forget your password, click the I've forgotten my password hyperlink located on the General Greeting and Information Page of Citizen Access (#1 shown). A new password is emailed to you at the email address provided on your application (#2 shown). Click Continue (#3 shown).*
Login and Logout

- **NOTE:** After creating an Account, you are able to login to Citizen Access using user name or email and password. After typing in your credentials, click on the blue Login button.

The Citizen Access User Dashboard

After creating a user account and login, the Citizen Access user dashboard displays. Users may start using all the services the Dashboard offers (shown).

Top Navigation Bar - Logout

The top navigation bar identifies the user. This navigation bar includes a hyperlink to Collections (a set of Records related to one project), Account Management and Logout (shown). **Click** the Logout hyperlink whenever you finish using Citizen Access (shown).
1. **Click** Collections hyperlink to view sets of Records. For example, a development project. *Citizen Access* displays the number of sets or collections of Records has created (shown).

2. **Click** Account Management to edit your personal, or organization’s, account information. Use the Account Management hyperlink to add or delete a delegate.

3. **Click** on Logout to exit *Citizen Access*.

**The Search Field**

A Search button is located on the upper right-hand corner of *Citizen Access* General Information and Welcome page to help the user do quick searches (shown).
1. **Type** the name of the item you are searching (this example uses the record-type acronym Planned Unit Development, PUD). User may also search by Address, Owner, Application Number or Parcel.

2. **Click** the magnifier (green icon shown).

3. **Citizen Access** returns all matches for your search. Clicking on any hyperlink displays the record information page.

4. From the results page that displays, you can further refine your search with the Search drop-down menu arrow or the Records hyperlink displayed under the **Search Results** Tab (shown).
The Home Tab

Access the Home Tab for account information. The options for locating information include the following hyperlinks: Dashboard, My Records, My Account and Advanced Search (shown).

1. Use the Home Tab to navigate to the Home Page (shown). The Home Page offers user access to General Information, Property Information, Conduct Searches, View Records, Edit/View Account Information and the hyperlink to Create Applications.
Dashboard Tab

A Collection is a group of projects—or sets of projects— that a user creates in Citizen Access. The Dashboard hyperlink displays user’s current Collections (see Collections).

The user’s Works in Progress, or applications not yet completed, are listed on this page (shown). Scroll to the Actions column and click Resume Application link to complete application (shown).
My Records Hyperlink

What is a Record?
Record is a term used to represent the identification number of an application.

1. Clicking on the My Records Tab displays all of the user’s records (shown). Click on the Record Number link to display Record detail information.

2. Click on the Page Numbers (shown) to advance from page to page and back again.
3. Use the scroll bars to move the page screen to the right or left (shown). The Action column displays link to record Amendment(s) or link to Pay Fees Due (shown).
4. User may Add a Record to a collection or Create a new collection from this page. To add a Record to a Collection, follow these steps:

**Collections**

Users can group records for specific projects or customers using the Collection option. This feature is useful to help organize multiple applications and records associated with a project. An account owner, or their delegate, can create collections and manage the records contained in the collections.

**To Create a Collection**

1. Click the My Records tab (#1 shown).
2. Click the box to the left of a Record to select it (#2 shown).
3. Click the Add to collection hyperlink (#3 shown). An Add to Collection screen displays (shown).
4. Click the drop-down menu to add records to an existing Collection (#4 shown), or
5. Click the radio button to the left of Create a New Collection to create a new collection (#4 shown).
6. Type a brief description of the Collection in the Description in box (#5 shown).
7. Click Add. Clicking on the Cancel button clears the Add to Collection screen.

8. After creating a Collection, additional records may be added in the same way to the Collection, except the collection exists and displays in the drop-down menu (shown).
View Records in Collections

1. **Click** the Collections hyperlink (#1 shown) or click the View Collections hyperlink in the Dashboard (#2 shown).

![Image 1](image1.png)

2. The Collections page displays (shown). To manage a collection, **click** the link next to the collection name.

![Image 2](image2.png)

3. After clicking the link to select a Collection, the Collection’s Detail Page displays (shown). Option buttons include **Rename Collection** or **Delete Collection** (#1 shown).

4. Other options include, click box to the left of a Record (#2 shown) and select:
   a. **Move Record(s)** to a different or new Collection (#3 shown)
   b. **Copy Record(s)** to a different or new Collection (#3 shown), or
   c. **Remove** a record from a Collection (#3 shown).
Move to/Copy to or Remove Records

Deleting a Collection

5. If **Delete Collection** is selected, Citizen Access displays a confirmation message (shown). The Collection is deleted and not the records.

Paying Fees in a Collection

6. Users may pay fees from this page. **Scroll** to the right, **locate** the Action column. **Click** the Pay Fees Due link (shown).
My Account Tab

1. Clicking on the **My Account** Tab displays the **Account Management** page (shown). **Use** the **My Account** tab to access Account Owner’s Account Information (shown). Edit Account Owner information on this page. Add, Remove or Update Contact and Delegate information from this page.
NOTE: The Tab that is active displays in bold text (shown).
Advanced Search Tab

Two searching options hyperlinks display when clicking the Advanced Search drop-down menu arrow: Lookup Property Information and Search Records/Applications Land Development. (shown).

Lookup Property Information-First Hyperlink Option (#1)

Clicking on the Lookup Property Information hyperlink displays the options drop-down menu to Look Up Property Information by:

- Address
- Parcel Information
- Owner

1. Click to select an option. Complete fields with any information you may have.
2. Click the Look Up blue button to retrieve information.
   a. Click the Clear button to erase all information typed and start over.
Clicking on the **Search Records/Applications Land Development** displays Land Development Records/Applications (shown).

1. **Search** by General Search (Application, Address, and Parcel)
2. **Search** by Address
3. **Search** by Contact
4. **Citizen Access** searches database and returns all matches.
5. **Click** on the Record Number hyperlink to access Record details.
NOTE: Columns of information found on the page: Date, Record Number, Record Type, Description, Project Name, Expiration Date and Status.

After clicking on a Record Number hyperlink the Record details page displays (shown).
Add Record to a Collection

Customers can add a Record to a Collection. This option is used to select records that pertain to one specific project or purpose (example: multiple home housing development). *Add to collection* link displays on the Records page (shown). See section on Collections.

Record Details

After clicking on a Record Number hyperlink, the Record Detail page displays (shown). **Note that the Tab is now Land Development** (shown).
The Record Details section of the page displays Applicant, Owner and Project Description (shown). Clicking on the More Details arrow displays additional categories of information (shown).

**NOTE:** The + (plus) sign in front of a Category open and information page. After clicking on the + sign to display Category information, the + signs changes to a – (minus) sign. To close the page after viewing the information, click on the – (minus) sign in front of the selection.

After expanding a Category, more Record details display (shown). Expand each Category to see Category information. Example shows the expanded Related Contacts category.
Amendments

If there are possible Amendments to the Record type that you are managing or viewing, the Create Amendment Tab displays at the bottom of the Record Detail page (shown). Click the Create an Amendment hyperlink to create the Amendment. Note: Withdrawal or Refund Requests must always be created as an Amendment to the parent (initial) record. Creating a Withdrawal Amendment permanently closes the record.
The **Create An Application** page displays for the Amendment type that may be created for this Record type (shown).

Clicking the **Continue Application** blue button takes the Customer to Step 1 of Creating an Application type.

**The Record Details Page Navigation Bars**

Two navigation links display on this page, **Create an Application** and **Search Applications** (shown). Clicking on the Home Tab at this point, returns the user to the General Greeting and Information page. The Land Development Tab is currently highlighted in black and indicates it is the active tab.

1. Use the second navigation bar to access **Creating an Application** or to **Search Applications**.
2. Use the third navigation bar (shown) to access **Record Information** or to make a **Payment** or view Fee information (shown). If a specific Record has any Conditions applied to it (for example a Do Not Record), the Conditions tab displays the number of conditions applied (shown). Click the number to view Condition types.
Land Development Tab

The Navigation Bar

Use the Land Development Tab to Create an Application or Search Citizen Access for an Application.

The Land Development page displays Records (# 1) and a General Search area (# 2) (shown).
Search Applications Tab

The Search Applications/Records section of the page offers option for *Adding Records to a Collection* (shown):
1. Click the box to the left of the Record you want to add to a collection
2. Click Add to Collection.

Use the scroll bar located at the bottom of the Records section (shown) to navigate to the Action column. The Action column displays links for additional functions that may be performed on a record. Click the link of an action to activate.
TEMP Records (Temporary Records)

Note that Temporary records do not have a link. Scroll to the right of the page to the Action column to access the Resume Application link (shown). Click on the Resume Application link to continue and complete the application process. Temporary Records are not stored indefinitely.

PIN Numbers

Claiming Your Record

Pin Numbers are issued by DSD Staff to customers based on account user’s request. PIN Numbers are issued to converted records that, for one reason or another, do not display on the user’s account.

How to use a PIN Number

1. **Contact** BuildSA Customer Call Center (210) 207-1111 (option #5) to receive PIN Access Acknowledgement form.
2. After receiving your PIN Number from DSD Staff, **login** to your Citizen Access portal account.
3. **Click** Claim Your Record hyperlink (shown).

4. The Terms and Conditions form displays. **Click** the box to the left of *I have read and accepted the above terms* (shown).
5. **Click** Continue Registration. The Record Authorization Section displays (shown).

6. **Click** Add a Row (shown). You are currently in **Step 1** of 3 steps.
IMPORTANT: More than one Row may be selected from the Add a Row drop-down menu (shown).

7. The RecordLink page displays (shown). **Type** the Record Number in the required field. **Type** the PIN Number in the required field (shown).

8. **Click** Submit.
9. Click Continue Application. You are now in Step 2: Review (shown).

10. Click Continue Application.
11. You are now in Step 3 Record Issuance (shown). The system generated a RecordID number for you to use to view Record Details. Jot the number down or print the page for future reference.
7. **Click** View Record Details to view Record information. You may generate Activity Report from this page (please see User Guide section on Activity Report).
All Records display on the Records search page (shown). Use the scroll bar at the bottom of the page to scroll to the right and view more information about the Record.

Use the page numbers on the bottom of the page to scroll through all the pages of Records (shown).

To access a Record, click on the Record’s hyperlink in the Record Number column (shown).

**General Search/Search for Records Section**

The General Search/Search for Records section of the Land Development Tab page includes a Search drop-down menu with options for searching (shown). Search records by any of the following:

- General Search (Application, Address and Parcel)
- Address
- Contact
Search by Address

If Search by Address is selected, **Citizen Access** displays a Search by Address page (shown). **Type** known information in the appropriate address fields. **Click** Search. Clicking on the Clear blue button clears all information typed.

- There is an option to search user’s applications only (shown).
**Citizen Access** returns all matches found in the database (shown). Note that **Citizen Access** tells the user the number of search results.

From the **Citizen Access** page, click on your address selection. All Records related to the selected Address display (shown):
Search by Contact

If Search by Contact is selected, Citizen Access displays a Search by Contact page (shown). Type known information in the appropriate address fields. Click Search. Clicking on the Clear blue button clears all information typed.

- There is an option to search user’s applications only (shown).
Citizen Access returns all matches found in the database. If a match is not found, Citizen Access displays the message shown below. Modify your search criteria and try again.

In the example shown, the search was modified by typing the Name of Business (shown). After clicking the Search button, Citizen Access returned all matches for the name.

Click on the Full Name, Business Name or Contact Type column hyperlinks to access Record and view all information (shown).
General Search

In the **General Search** section of the page the user may search records by (shown):

- Application
  - Application Type drop-down menu
  - Date Ranges
- Address
- Parcel

User also has the option to select **Search My Applications Only**.

**Type** the Application Number, if known. Date Ranges may be used, if known (shown).
Use the Application Type drop-down menu to search by Application Type (shown).

Type the Parcel Number, if known (shown). Click Search.

Citizen Access displays all matches found in the database (shown). Navigate to the Record Number column (shown). Click on the Record Number hyperlink of the Record you want to access. Use the page numbers at the bottom of the page to view all pages of records (shown).
Create an Application Tab

- Clicking on **Create an Application** takes user to the disclaimer page (shown). Read through the disclaimer to become familiar with the terms and conditions.
To create an application

1. Disclaimer displays. Use the scroll bars to read entire disclaimer.
2. Click the disclaimer box to acknowledge the Terms are read and accepted (shown).
3. Click the Continue Application button (shown). The Creating this application as page displays (shown).

4. If you are creating this application for yourself, select Myself (shown).
• If creating the application as a delegate for another person or organization, **click** the radio button to the left of *Another person* required field (*) (shown). Click the drop-down menu arrow to select the person or organization for whom you are creating the application (shown).

5. **Click Continue Application.** The **Select a Record Type** page displays (shown).

![Select a Record Type page](image)

To create an application, user may either type application name in the Search field (#1) OR click the button to the left of the application type (#2).

6. **Type** the application name in the Search field (#1) or click the button to the left of the Record Type to select it (#2).

7. **Click Continue Application.** In this example, a Rights Determination application is being created. **Citizen Access** displays the **Rights Determination Intake Application** form. Note the navigation bar displays the current active step in the process:
Step 1 Property Information

8. **Complete** all Address, Parcel or Owner required fields. If the address, parcel or owner information are in the system database, the empty fields pre-populate after user clicks the **Search** button.

9. When all required fields are complete, **click Continue Application**. Please note: remaining steps of this process (Step 10, etc.) located after **Save and Resume later section** that follows below.

### Save and Resume later option

- **Note**: If the user is not able to complete the application at this time, the option to **Save and resume later** displays (shown). If the blue **Save and resume later** button is used, **Citizen Access** assigns a temporary number to the application (shown).
2. To resume the application at a later time:
   I. Login to your Citizen Access account.
   II. Navigate to the Works in Progress section (shown).
   III. Find the Application Temporary Number.
   IV. Click the Resume Application link (shown).

v. Citizen Access displays the Select Application Flow Step message (shown).
   Click to select where to begin with the application process flow.
vi. **Citizen Access** displays the Select Application Flow Step message (shown). Click to select where to begin with the application process flow. It is best to start from the beginning to ensure all information is captured and correct.

vii. Click **OK**. Clicking the **Cancel** button takes user back to Home page.

---

10. The Additional Parcel(s) page displays (shown). If there aren’t additional parcels, click the **No Additional Parcels** hyperlink to continue (shown). If there are additional parcels, type Parcel Number in the Add Additional Parcels section (shown).
11. Click Continue Application. Note the system takes user to Step 2: Contact Information>Applicant page (shown). Review Applicant information.

**Step 2 Contact Information**

12. The Contact Information>Applicant page displays (shown). In the Applicant Also Known As, click the box to the right of your selection, if any (shown).
13. **Click** Continue Application. The **Step 2: Contact Information > Contacts** page displays (shown). **Click Select from Account** hyperlink tab to select a Contact (shown). Citizen Access displays the Contact type required for this application type in the Contact List section (shown). The example shows a Property Owner is required.
14. If the Property Owner displayed is accurate for this application (#1 shown above), click Continue Application.
   
a. If you want to select another Property Owner name, click Select from Account tab. The Select Contact from Account page displays (shown). Click the radio button to the left of the Contact you are selecting as the required type of Contact for this application.
b. **Click** Continue.

c. The *Select Contact from Account* page continues (shown). Click the drop-down menu arrow to select the Contact type required for this application (shown). In this example, Property Owner is required and selected.

![Select Contact from Account](image)

<table>
<thead>
<tr>
<th>Type</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Owner</td>
<td>Property Owner</td>
</tr>
<tr>
<td>Architect</td>
<td>Architect</td>
</tr>
<tr>
<td>Authorized Agent</td>
<td>Authorized Agent</td>
</tr>
<tr>
<td>Business Owner</td>
<td>Business Owner</td>
</tr>
<tr>
<td>Contractor</td>
<td>Contractor</td>
</tr>
<tr>
<td>Engineer</td>
<td>Engineer</td>
</tr>
<tr>
<td>Facility Manager</td>
<td>Facility Manager</td>
</tr>
<tr>
<td>Non-Profit</td>
<td>Non-Profit</td>
</tr>
<tr>
<td>Property Owner</td>
<td>Property Owner</td>
</tr>
<tr>
<td>Recipient</td>
<td>Recipient</td>
</tr>
<tr>
<td>Surveyor</td>
<td>Surveyor</td>
</tr>
</tbody>
</table>

**Note:** Add a Contact, mailing and physical address, to the Account Management page before creating the application.

15. The system displays a **Contact added successfully** message (shown). **Click** Continue Application. Notice that Citizen Access advances to **Step 3-Application Information** on the Navigation bar (shown).

![Contact List](image)
Step 3 Application Information

16. **Navigate** to the Detail Information section of **Step 3: Application Information >Application Detail** (shown). **Complete** open text boxes (shown).

17. **Scroll** to the Custom Fields section of the page (shown). **Complete** all required field/text boxes (those with a red *).
18. **Click** Continue Application.

**Step 4 Document Upload Affirmation > Documents**

19. The **Step 4: Document Upload Affirmation > Documents** page displays (shown). **Click** Add to upload a document (shown).
Note: Citizen Access displays the maximum file size allowed and the documents required for this Application type (shown).

20. To add documentation, click the blue Add button (shown). The File Upload screen displays (shown). Note: Citizen Access displays the file types disallowed to upload.

21. Click Add. The Internet Web Browser window displays (shown). Click Open to select a file and upload to Citizen Access (shown).
22. The **File Upload** screen displays the uploaded file at 100% (shown). **Click** Continue. To add another document, click **Add**. If the **Remove All** tab is clicked, uploaded information is removed. Clicking **Cancel** navigates the user to previous page.

23. The File is uploaded into **Citizen Access**. The Attachment section of the page contains two required fields: **Type** of document and **Description**.

24. **Click** the **Type** drop-down menu arrow to display options. Note: this is a required field.

25. **Click** to select the type of document attached.
26. **Type** Description in Description box. **Click Save.**
27. **Citizen Access** displays a message stating the attachment(s) are successfully uploaded (shown).
28. **Click Continue Application.**

29. Note the Actions hyperlink drop down menu for the attachment (shown).
a. To Add another document, click the Add button (shown).

**Document Maintenance-Electronic Document Review (EDR) and Additional Documentation**

After applications are created in Citizen Access, communications between Development Services Department-Land Development services and the customer commence. To upload or review documentation after a record is created follow these steps:

1. **Login** to Citizen Access Account.
2. **Find** the record.
3. From the Record Info Tab, click the drop-down menu arrow (shown).
4. **Click** to select Attachments (shown).
5. The Attachments page displays (shown).
a. Use the **EDR Information** (EDR is the acronym for Electronic Document Review) link to see status of review by all reviewing agencies for your submitted documents (#1 shown). **Please see EDR Tutorial for instructions on downloading/marking/uploading documentation.**

b. Submitted documents display on the **Attachments** section of the page (#2 shown). Use the scroll bar to view all information including the **Actions** drop down menu. Click View Details from the Actions drop-down menu to view document detail (shown).
6. To Add other documents (not EDR documentation) use the Add link (#3 shown below).

a. After Add link is clicked, the File Upload page displays. Click Add to upload documentation.
Step 5 Review

30. **Click** Continue Application. User is now in **Step 5: Review** (shown). During Step 5: Review, user may review all information and edit, as necessary. To edit a section, click the *Edit* button that directly follows it (shown).

31. After Review, and editing if necessary, **click** the box to the left of the *By checking this box, I agree to the above certification* (shown).
32. **Click Continue Application.**

**Step 6 Pay Fees**

33. User is now in **Step 6: Pay Fees** of the Application Intake Form (shown). Review fees for accuracy.

34. **Click Continue Application.** The Payment Options page displays (shown). **Select** a Method for Payment, Credit Card or Bank Payment (shown). Note: Trust Accounts are not available at this time.
32. Click Continue.
The City of San Antonio’s Citizen Access uses Accela CivicPay: A Payment Platform Designed Specifically for Government

Accela CivicPay is a secure, online modern payment platform for customers to safely and securely pay fees. While CivicPay is packed with features, here are the top things we think will be most important to our customers.

1. **Manage your payment reconciliation process and make and view payments in real time.**

Customers no longer need to spend countless hours reconciling payments to ensure that money is in the bank. A process that takes 2-14 days is now instantaneous. That’s because CivicPay payment reconciliation and other processes take place in real time. When our customers make a payment, it shows up now rather than hours later.

Other advantages to performing activities in real time is that it promotes transparency. When customers make payments, they will have complete visibility and be able to see the completed transaction. And, if a customer calls in to make a change, that change can also be processed in real time.

2. **Reduce manual payment processing and save time by offering online payments from any device.**

CivicPay enables citizens to pay online anytime, anywhere: mobile or desktop. Offering online payment options not only makes it more convenient for our customers when transacting with us but it saves our staff time. Customers can still make payments in person. And, when they do, the process is quicker and more transparent when verifying a payment is possible while the customer is still there.

Rest assured that credit card information is safe and secure because CivicPay is PCI-compliant and features point-to-point encryption. This means that your credit card data is protected. When you enter your credit card information, it is not stored anywhere. It goes directly to the financial institution in an encrypted transmission.

35. Payment page displays (shown). In this example, credit card payment was selected. **Type** information (#1 shown).
36. **Click** Complete Transaction (#2 shown).
IMPORTANT: Fees are paid after the application is reviewed and certification is confirmed. Once the fees are paid online, the application is given the formal record number. Prior to payment of fees the record is in a temporary status with a temporary number. Customers must create an online user account to pay fees online. Temporary records can be found under the MY RECORDS tab.

IMPORTANT: Trust Accounts are not currently available as a payment option.
Step 7 Record Issuance

37. The **Step 7: Record Issuance** page displays (shown).

- **NOTE:** Click Print/View Receipt Tab to print or view a receipt of the application (shown).
NOTE: After payment, an email is generated by the system to the Applicant, at the email address on the Account Management page. The email contains a copy of the invoice as attachment and the type of application created and the Record number assigned to the application (shown).

Search Applications

The Search Applications hyperlink navigates the customer to the Records and General Search page. Customers may click on a hyperlink to access any record that displays OR conduct a General Search, Search by Address or Search by Contact (shown).
Application Status

After submitting an application(s), account owners may login to their Citizen Access Account to view the status of said application(s).
The Home Tab - Option One

1. **Log in** to Citizen Access Account (#1 shown).
2. **Click** Home Tab (#2 shown)
3. **Click** My Records tab (#3 shown).
4. **Find** Record and **view** Status column (#4 shown).

Search Field - Option Two

1. **Log in** to Citizen Access Account
2. **Click** Land Development Tab
3. **Find** Record using search field (#1 shown), Record Number column hyperlink (#2 shown) or Record search area (#3 shown).
4. After retrieving record, the Record Status displays (#1 shown on next page). To look for more detailed processing information, click on the Record Info drop-down menu and click to select Processing Status (#2 shown).
5. The Processing Status information section displays (shown). **Click** the arrow to the left of a process to expand the category (Application Intake and Completeness Review shown).

The yellow asterisk shown means this is the most recent task worked on for this record.
**Activity Report**

It is easy for Account Owners to track the activity of a record using the Activity Report option available. The Activity Report displays workflow status information, activities performed (example: Inspections) dates and task assignments (shown).

Access to a Record’s Activity Report is accessible to all viewers.

![Activity Report Example](image)

**To Generate the Activity Report**

1. **Retrieve** the Record. You may use your My Records tab (shown on next page) or, if you know the Record ID number, you may use the Search option located at the upper, right-hand corner of the page (shown). Remember, the Activity Report is accessible to all viewers of the site.
2. After locating the record, click Reports hyperlink located on the top navigation bar and directly below the red banner (shown). User must be in the Record in order for the Reports hyperlink to display (shown).

3. Click the Reports hyperlink drop-down arrow (shown). The Activity Report hyperlink displays (shown).

4. Click the Activity Report hyperlink. The Input Report Parameter(s) page displays (shown).

5. Type the Record ID number in the RecordID required field text box (shown). Click Submit.

**Requesting a Withdrawal/Refund**

Customers may withdraw applications and request a refund, as necessary.

**Withdrawing an application and requesting a refund**

1. **Login** to account.
2. **Locate** the application that you are requesting to Withdraw or for which you are Requesting a Refund.
3. **Click** the Record Number link to access the record (shown).
4. The Record’s detail page displays. **Click the Create Amendment link** located at the bottom of the Record Detail page (shown).
5. A list of Amendments applicable to the specific record type displays (shown).

6. **Click** the radio button to the left of Withdrawal or Refund Request (#1 shown).
7. **Click** Continue Application (#2 shown).
8. Citizen Access displays **Step 1** of the Withdrawal or Refund Request application (shown). Note the Address, parcel, Owner information from the original application pre-populate the fields.

9. **Click** Continue Application link located at the bottom of the page.
10. Contact list displays. **Click** Continue Application. Note the Save and Resume Later option is available for this application type.

11. **Complete** required fields (those fields displaying a red asterisk *).

12. **Click** Continue Application.

13. Citizen Access proceeds to the Document section of the application process. Uploading documentation is optional (shown).

14. **Click** Continue Application.
15. Citizen Access proceeds to Step 3, the Review section. Click a section’s corresponding Edit link to review or edit that particular section (shown).
16. **Use** the scroll bar to read disclaimer. **Click** the box to the left of the disclaimer acceptance statement (shown).

17. **Click** Continue Application.

18. Citizen Access proceeds to Step 4, the Pay Fees section. The fee for the Withdrawal & Refund Request is $100.00. **Review** fee amount (shown).
19. **Click** Continue Application.

20. The Accela Civic Pay page displays (shown). **Click** the radio button to the left of preferred payment method (example shows credit card).

21. **Click** Continue.

22. In this example, credit card was selected. **Type** credit card information to pay the $100.00 fee.

23. **Use** the drop-down menu arrow to select card type and expiration date (shown).

24. **Click** Make Payment (shown).
25. Payment validation displays (shown).

26. Citizen Access advances to Step 5, Record Issuance. The Record number for the Withdrawal & Refund application is issued (#1 shown). **Write down** Record ID# for future reference.
27. Click the Print/View Receipt link to print the receipt or to view it (#2 shown).
28. Click the View Record Details link to view the Withdrawal & Refund Request record details.
29. A Refund check will be mailed to the primary Contact’s mailing address as listed on the original Record.

**Inspections**

With Citizen Access, customers are able to view, cancel or request an inspection 24/7. Inspections requested by customers display as pending requests for Development Services Staff. Pending inspections requests are monitored on a daily basis for appropriate scheduling and assignment.

Customers may also cancel Inspection requests, as necessary.

**View Inspection Assignment or Results**

1. **Login** to your Citizen Access account
2. **Click** the Home Tab (#1 shown).
3. **Click** the My Records hyperlink (#2 shown).
4. In the Record Number column, **find** the record to View/Request or Cancel an inspection (#3 shown).
5. **Click** the record link to access Record.
6. The Record Details page displays (shown).
6. **Click** the Record Info drop-down menu arrow (shown). **Click** to select Inspections (shown).

7. The Inspections section of the record displays (shown).
   a. This Page displays the following information:
      i. upcoming inspections
      ii. inspectors assigned
      iii. date of inspections
      iv. completed inspections
      v. an actions menu and a hyperlink to Schedule or Request an Inspection (shown).
8. The **View Details** options of the Actions drop-down menu displays detailed inspection page (shown).

9. **Click** the View Status History or View Result Comments hyperlink for more detailed information about the inspection (shown).
10. **Click** the X in the upper right-hand corner to close out of this page.

**Request an Inspection**

1. **Login** to your Citizen Access account
2. **Click** the Home Tab (#1 shown).
3. **Click** the My Records hyperlink (#2 shown).
4. In the Record Number column, **find** the record to Request an inspection (#3 shown).
5. **Click** on the record link.
6. Click the Record Info drop-down menu arrow (shown).

7. Click to select Inspections (shown).

8. Scroll to the Inspections section of the page. Click Schedule or Request an Inspection (shown).
9. The Schedule/Request an Inspection page displays (shown). **Click** the box to the left of *Show Optional Inspections*, if you want to view the optional inspections (shown).

10. **Click** the radio button to the left of an Inspection to select it (shown).

11. **Click** Continue when through selecting Inspections. **Note:** Clicking Cancel takes user back to the previous page.

12. After clicking Continue, the Schedule/Request an Inspection Location and Contact page displays (shown). Verify the Location and Contact for accuracy.
13. To Change Contact information for an Inspection, **click** the Change Contact drop-down arrow (#1 shown). Select the Contact from the list that displays (shown).

14. To specify another person for this inspection only, **click** the radio button to the left of *Specify another person (for this inspection only)*. **Complete** all required fields (#2 shown). **Click** Submit (#3 shown).

15. Contact information is updated. **Click** Continue (shown).
16. The Confirm Your Selection page displays (shown). **Verify** the information listed. To include Additional Notes, click the Include Additional Notes hyperlink. An Optional Comments or Instructions for your Inspector free text box displays (shown); for example, comments or instructions about the site.

17. **Click** Finish. The requested Inspection is listed as TBD (To Be Determined) pending assignment by Development Services Department staff and availability (shown).
Note: Clicking the Actions drop-down menu at this point, displays hyperlink to cancel the inspection (shown).

To Cancel An Inspection

1. Login to your Citizen Access account
2. Click the Home Tab (#1 shown).
3. Click the My Records hyperlink (#2 shown).
4. Find the record number for the record to cancel the inspection (#3 shown).
5. **Click** on the record hyperlink.

6. **Click** the Record Info drop-down menu arrow (shown).

7. **Click** to select Inspections (shown).

8. **Scroll** to the Inspections section of the page. **Click** the Actions drop down menu corresponding to the Inspection scheduled (# 1 shown). **Click** Cancel (#2 shown).
9. The Cancel Inspection-Confirm Your Selection page displays (shown).

10. **Click** the Cancel Inspection blue button (shown).

11. Citizen Access returns to the Inspections section of the record (shown). Note the Inspection cancellation notice displays (shown).
12. Click View Details to view the details of the cancellation and/or to print the Cancellation page (shown).
Create an Amendment

An amendment to a record is a change or an addition to the original, existing record. Customers may create Amendments for records.

NOTE: To update contact information or with questions about adding or removing a contact on a record, please contact Development Services Department-BuildSA Customer Contact Call Center.

To create an Amendment to a Record

1. Login to your Citizen Access account
2. Click the Home Tab (#1 shown).
3. Click the My Records hyperlink (#2 shown).
4. Find the record number to create an amendment (#3 shown).
5. Click on the record hyperlink to access the record.
6. The Record Detail page displays (shown). A blue Create Amendment hyperlink displays at the bottom of the page (shown). Click the Create Amendment hyperlink (shown).
7. Amendment types available display (shown). **Click** the radio button to the left of amendment selection (shown).

![Click radio button to the left of selection.](image)

8. **Click** the Continue Application blue button (shown). An application for the amendment displays. **Complete** the application intake form, progressing Steps 1 through 7 (shown).

![Complete the application intake form.](image)

❖ **NOTE:** See the Create an Application section of this guide for instructions.
Account Management

The Account Management page may be accessed two different ways.

Method #1 Accessing Account Management

1. Login to your account.
2. Click on the Account Management tab to view or edit your personal account information (shown). The tab is located on the first navigation bar directly below the Red Welcome Banner (shown).

2. Citizen Access displays user’s personal Account Information with option to edit Login Information, Add a Contact and the option to Add a Delegate (shown).
**NOTE:** A delegate is a person authorized by the user to view all or restricted categories of account records. The owner of the account authorizes the Delegates to view and/or access record categories and/or to pay fees. See Delegates vs. Contacts Tutorial.

Method #2 Accessing Account Management

**My Account Tab**

Account Management information may be accessed by clicking on the My Account Tab. The My Account Tab is located on the Home Tab navigation bar (shown). Clicking the My Account hyperlink displays the Account Management page (shown).

**NOTE:** The Tab that is active displays in bold text (shown).

Edit Login Information on the Account Management Page

1. **Navigate** to the Login Information section to edit.
2. Click the blue Edit button (shown).

![Citizen Access for San Antonio](image)

3. The Login Information page displays. Edit information, as needed (shown).

4. Click Save when through editing (shown). Clicking on Back to Account Management clears any information typed and closes the editing panel (shown).

⚠️ **The same email address must be used when creating new applications or searching for existing records. The system uses this email address to generate emails, notifications, alerts, requests for additional information, inquiries, etc.**
NOTE: Clicking on a blue question mark (Tool Tip) opens a text box containing information specific to that fields (shown). In the example shown the information tells the user that a user name must contain 4-32 characters and may contain letters, number and special characters such as those shown.

**Edit Contact Information**

A minimum of one contact must be associated with an Account. While multiple contacts can be associated with the Account; one contact is required. This information is available to populate fields when the registered user completes the Contact information.

The contacts created by the User are stored in the Reference Contact database and are associated with the user and used when creating an application or searching for Records.

Contacts may be either Individuals or Organizations. Customers may want to maintain the contact address information for a contact, for example, current mailing addresses to send mail to or the home address of a contact.
❖ **Primary Contacts:** When you have multiple contacts on a record, customers must select a primary contact. A primary contact is the individual or organization who will receive emails regarding the record.

❖ **Adding/Removing Contacts from existing applications:** Contact Development Services Department, BuildSA Customer Contact Call Center about adding or removing contacts after a record is created, (210) 207-1111 (Option 5).

To edit Contact Information on the Account Management page

1. **Navigate** to the Contact Information section of the Account Management page (shown).
2. **Find** the Contact you wish to edit on the list (shown).

![Contact Information](image)

3. **Click** on the Actions hyperlink drop-down menu (#1 shown). Options for editing display (#2 shown).
4. **Click** View to display edit screen (shown). *Citizen Access* displays the Contact Information page (shown).

5. **Edit** fields as necessary. **Click** Save when through editing.
Edit or Add Contact Address

1. **Click** on the **Contact Addresses** drop-down menu arrow (shown).

   ![Image of Contact Addresses drop-down menu](image-url)

   **Clicking on the Address hyperlink or clicking on the Actions drop-down menu arrow to select Edit (shown).**

2. **Contact Addresses** section displays (shown). **Click** on the address hyperlink or click on the Actions drop-down menu arrow to select Edit (shown).

3. The **Contact Address Information** page displays. **Edit** information as necessary. **Click Save and Close**, if finished; or, click **Save and Add Another** if additional addresses are to be added (shown).
4. After adding additional Contact Addresses, **Citizen Access** displays a Contact address added successfully message (shown). The address added displays (shown).

5. From the Contact Information page, click Save. Not clicking the Save button does not save the updated or added information. Clicking on Back to Account Management takes user back to Account Management page **without** saving additions or updates.

**Delegates in the Account Management Page**

If an organization has multiple users, they may use the Delegate feature to allow multiple users to access one account.
Account Owners may authorize a delegate(s) for their user account that allows the delegate to access owner account information. The delegate, authorized by the owner of an account, may view or access application data. The account owner controls the information and tasks a delegate is authorized to access or view. A person invited as a delegate must be a registered user on the Accela Citizen Access portal. Invitations are accepted on the Account Management page.

Delegate Privileges

Delegates may view records across all categories but may be restricted to Create, Renew, Amend, Manage Inspections or make payments in account owner’s Citizen Access account.

Authorizing (Adding) a Delegate to Account

1. Click the Account Management hyperlink (shown).
2. Navigate to the Add a Delegate area of the page (shown).

3. Click the Add a Delegate blue button (shown). The Add a Delegate page displays (shown). The Account Owner may check the box to the left of a permission category to grant access for that privilege to the Delegate (shown). Viewing documents is the default privilege.
4. **Type** the Name and email address of the person you want to authorize as a Delegate to your account (#1 shown).

5. **Type** the Email address of the Delegate. The invitation to become a delegate for this account will be sent to the email address typed (#2 shown).

6. The default privilege that the account owner authorizes is to view Records (#3 shown).

7. Delegate privileges that the account owner may further authorize include the following categories. **Click** the box to the left of a privilege to grant authorization to the delegate (#4 shown).
   - Create Applications and Renew Records 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

8. **Click** the *I’m not a robot* box (#5 shown).

9. **Click** the Invite a Delegate blue tab hyperlink (#6 shown). The invitation is systematically sent to the Delegate’s email address. Once the invitation is received, the person invited as delegate shall login to their Citizen Access account, Account Management page, to accept the invitation. A sample of an email invitation follows.
Sample of email invitation sent to delegate. Delegate logs into his/her Citizen Access account, Account Management page, to accept or reject the Delegate request (shown below).

10. The Delegates section of your Account Management page displays the person invited be a delegate. If you wish to view the Invitation, click the View Invitation hyperlink (shown).

11. The Manage Delegates page displays (shown).
11. The Manage Delegates page displays Delegate’s name and email address and the date the invitation was sent (#1 shown).
12. Editing to Delegate privileges may be made at this time (#2 shown).
13. Click Save Changes when through editing or click Cancel to return to Account Management page (#3 shown).
Sample of Account Owner’s, Account Management page, Delegates section.

Removing/Editing a Delegate

1. In the Delegates section of the Account Management page, click on the Actions hyperlink drop down menu arrow that corresponds to the Delegate for whom you wish to edit permissions (View Permissions hyperlink) or Remove as a Delegate (shown) (#1 shown).
2. Click **Remove**, **View Permissions** or **Edit Permissions**.
   a. If **Remove** is clicked, the Delegate is removed.
   b. If **View Permissions** is clicked, the **Manage Delegates** page displays.
      i. Review Name, Email Address, and Delegate date information (#1 shown).
      ii. Review Permissions and click on selected categories to edit or Edit these permissions hyperlink (#2 shown).
      iii. Click Back to Account blue tab to return to the Account Management page, or click **Remove this delegate** hyperlink to remove delegate (#3 shown).

3. If **Edit Permissions** is clicked, the **Manage Delegates** page displays (shown).
   iv. Review Name, Email Address, and Delegate date information (#1 shown).
   v. Check the box to the left of permissions to add or remove (#2 shown).
   vi. Click Save Changes to return to Account Management page (#3 shown).
Delegate vs. Contact

A Delegate is a person authorized by the account owner to view and/or access their account information. In addition, the account owner may authorize a delegate to do the following categories from the account owner’s account.

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

A Contact is an individual or an organization that the account owner partners with on projects. A contact can be an engineer, a property owner or a company. A contact can be used on a single project or on multiple projects. The account owner can add or delete a contact using their Account Management page.
Unlike a delegate, a contact has limited access to records only.

- Receive Notifications
- Schedule Inspections
- Make Payments

**FAQs**

**How do I create an account or log in to Citizen Access?**

1. Click Register for an Account hyperlink | Accept Terms and Disclaimer | Click Continue Registration| Complete Account Information Page.

**How do I search for an application (record) in Citizen Access?**

1. Login| Click Land Development tab | Click Search Applications | Search for Records

**Things to Know:**

- The Search page gives several search options:
- Customer may click on Record hyperlink to access record, or
- Conduct a General Search/ Search by Address/ or Search by Contact.

**How do I upload a document in Citizen Access?**

When creating new applications, it is important to submit all documentation required for the application (Step 4 of Creating a new application).

**Things to know:**

- Documents must be scanned and uploaded individually.
- Each document that is scanned must have a specific name (Original Application, Permits, Contracts, any supporting documents)
- Click the Document Upload Affirmation Disclaimer box. Next, click Continue Application (shown). The File Upload page displays.

**How do I review a Record’s processing status?**

1. Login| Click Home tab | Locate Record, and click Record Info.
2. Click **Processing Status** in dropdown menu
3. Status of applications is listed showing all workflow steps, steps complete, steps in process and steps to complete.

How do I pay fees in Citizen Access?

**While creating the new application**
1. Citizen Access displays fees in **Step 6 of the Application Intake** form | **Verify** fees are correct | **Click** Continue Application
2. Citizen Access displays *How would you like to make the payment* page | **Click** radio button to the left of *Credit Card* or *Bank Payment* to select | **Payment Amount** displays | **Click** Continue or Cancel
3. Online Payment form displays Complete information | **Print or save** Receipt
4. **Step 7 Record Issuance** displays | **Jot** Record Number for future reference

**After application is created**
1. Login to account | **Click** My Records tab | **Locate** Record Number column | **Find Record**
2. **Scroll** to the right to find Action column | **Click** Pay Fees Due link | **Click** Continue Application | **Select** *Credit Card* or *Bank Payment* | **Verify** Amount | **Click** Continue or Cancel
3. Online Payment form displays | **Complete** information | **Click** Make Payment | Receipt displays briefly | **Record Issuance** page displays
4. **Print/View** Receipt or **view** Record Details

How do I apply for a refund?

1. Login to account | **Click** My Records tab | **Locate** Record Number column | **Find Record**
2. **Scroll** to the right to find Action column | **Click** Amendment link | **Click** Land Development-Withdrawal or Refund Request Application | **Click** Continue Application
3. Complete steps 1 through 5 | **Select** *Credit Card* or *Bank Payment* to pay $100 withdrawal/refund fee | **Click** Make Payment
4. **Print/View** Receipt or **view** Record Details
5. Refund check is mailed to Primary Contact mailing address on the original record.
How do I assign a Delegate?

To add a Delegate, the individual must already have an Online Services account.

1. **Login** | **Click** My Account or Account Management | **Scroll to the Delegates section** | **Click the Add a Delegate tab**
2. The Add a Delegate window displays | **Type** the **Name** and **E-mail Address** (of their Online Services Account). The email address is used to link accounts | **Select the permissions** to allow view; create records; update, renew or amend records; manage inspections or documents and make payments for the delegate.
3. Click the box to the left of I’m not a robot | **Click Invite a Delegate tab** | Email is sent to the Delegate.
4. The individual must go into their account and accept the invitation to be a delegate.
5. Once the delegate accepts the invitation, their name displays in the Delegates section of your Account Management page.

**Edit or Remove a Delegate**

Edit or remove a Delegate by clicking **View Permissions** or **Remove the Delegate** in the Actions drop-down menu.
Citizen Access Quick Reference Guide

Citizen Access Online Portal Quick Reference Guide

Things to Know:
- It is recommended that your computer be set to allow Pop-Ups. Allowing pop-ups ensures that vital forms display for your use.
- Account users can view details of their applications.
- Delegates of an account can view general information of an application and other application details as authorized by the account owner.
- Non-registered users may view general information on applications.

Create a User Account
1. Click Register for an Account to create an account.
2. Accept Terms and Click Continue Registration.
3. Complete the User Information Page.

Things to Know:
- Password must be between 8-21 characters long.

Login/Logoff Account
1. Click Login or Logout.

Things to Know:
- Login/Logout button located at top right-hand side of screen (Known).

Create an Application
1. Login Click Land Development tab | Click Create an Application | Click Add a Contact | Click Continue Application.

Things to Know:
- (select several rows from drop-down menu) | Type Record Number and PIN Number | Click Continue Application.
2. Click View Record Details.

Account Management
1. Log in Click Account Management hyperlink | Edit Things to Know:
- Account Management is used to view or edit user's account information.
- Account type
- Login Information
- Contact Information
- Trust Account Information (Trust Account available at a later date)
- Delegates

Contacts
Add a New Contact
1. Log in Click Account Management hyperlink | Navigate to Contact Information section | Click Add a Contact
2. Select Type of Contact | Click Continue Completion of Contact Information Form.

Edit Contact Information or Remove a Contact
1. Log in Click Account Management hyperlink | Navigate to Contact Information section | Scroll to the Actions drop down menu for the Contact you wish to edit | Select View/Remove.

Searching for an Application (Record)
1. Log in Click Land Development tab | Click Search Applications | Search for Records.

Things to Know:
- The search page gives several search options:
- Customer may click on Recent hyperlink to access record, or
- Conduct a General Search by Address or Search by Contact.

Pin Numbers
Pin Numbers are issued by DDP Staff to customers based on account user's request. Pin Numbers are issued to
Converted records that, for any reason or another, do not display on the user's account.
1. Log in Click Claim Your Record hyperlink | Accept Terms | Click Continue Registration.
2. Click View to edit Contact Information | Click Save when through.

Things to Know:
• A minimum of one contact is required to create a User Account.
• Create Contacts before beginning the Create Application process (Citizen Access searches for Contact information when creating new applications).

**Fees**
1. Citizen Access displays fees in Step 8 of the Application intake process. Verify fees are correct. Click Continue Application.
2. Citizen Access displays How much you like to make the payment page. Click the radio button to the left of Credit Card or Bank Payment to select. Payment Amount displays. Click Continue or Cancel.
3. Online Payment form displays. Complete Information. Print or save Receipt.
4. Step 9: Record Insurance displays. Enter Record Number for future reference.

**After application is created**
1. Login to account. Click My Records tab. Locate Record Number column. Find Record.
2. Scroll to the right to find action column. Click Pay Fees Due link. Click Continue Application. Select Credit Card or Bank Payment. Verify Amount. Click Continue or Cancel.
3. Online Payment form displays. Complete Information. Click Make Payment. Receipt displays briefly. (Record Insurance page displays.
4. Print/View Receipt or view Record Details.

**Uploading Documentation**
When creating new applications, it is important to submit all documentation required for the application (Step 4 of Creating a new application).

**Things to know:**
• Documents must be scanned and uploaded individually.

**Delegates**
Registered Account Owners have the option to enable other users to view and/or create applications, view status of applications and/or pay fees on their behalf. Delegates must be Registered Account Owners as well. The Account Owner may add permissions granted to a Delegate at any time.
1. Log in. Click Account Management tab. Scroll to Delegates section. Click Add a Delegate. Type Delegate’s Name and Email Address. Click Invite a Delegate. If you want to grant viewing permission or check the box to the left of additional permissions. Click Check I’m not a robot box. Click Invite a Delegate.

An invitation is mailed to the Delegate at the email provided. Upon their acceptance of your invitation, they are added as a Delegate to your account.

**Application Status**
Customers have access to view an application’s status 24/7.
1. Log in. Click My Records tab to locate Record. Click Record Number hyperlink. Record detail page displays.
2. Click Record into drop-down menu. Select Processing Status (Show shown). Click Processing Status (Show shown). Click arrow to the left of a category to expand.

**Things to know:**
• Account user must be in the Record for the Reports hyperlink to display.

**Activity Report**
The Activity Report is available for account users to access and review information about a specific record.
1. Login. Retrieve the Record. Click the Reports drop-down arrow. Click Activity Report hyperlink.
2. Type Record ID number on the Report Parameters screen. Click Submit. Click Open.

**Things to know:**
• Account user must be in the Record for the Reports hyperlink to display.