



ACA ONLINE PORTAL CREATION  
AND USAGE USER GUIDE FOR  
PERMITTING

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## Creating Accela Customer Account (ACA) Online Portal Account

A portal account should be created for each Licensed Professional and everyone that will be submitting permits on the Licensed Professional behalf.



**IMPORTANT NOTE:** Development Services Department (DSD) migrated all **active registered licenses** and **contacts** from Hansen to Accela. As such, it is important to create your new online account in Accela using your First Name, Last Name, Primary Phone Number and email address as it appeared in in the new system. This information must match exactly (**including commas, periods, spaces and special characters**) or Accela will be unable to match you with your migrated information. This match also allows the new system to link the correct active license(s) and permits to your online account, if you are the license holder.\*

*\*If your license was not active in Hansen prior to November 30, you are required to submit a new license registration application. Delegates/Authorized agents and non-licensed professionals conducting business with DSD must also create a new online account using the same process.*

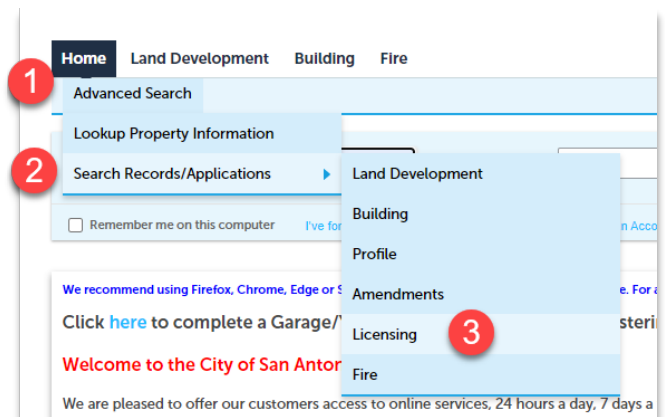
### Steps to locate Contacts in new system

1. Go to <https://www.sanantonio.gov/dsd>
2. Scroll to “ONLINE SERVICES – QUICK LINKS”
3. Click on **Build SA**



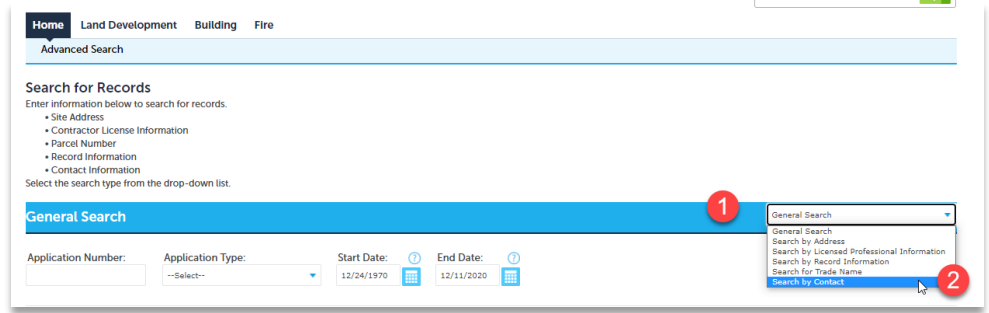
Starting from the **Home** page of the ACA Online Portal, click on

1. Advanced Search
2. Search Records/Applications
3. Licensing



From the **Search for Records** page, navigate toward the bottom of the page and

1. Click on the **General Search** dropdown
2. Select **Search by Contacts**



Once the Contact fields display, enter the following information:

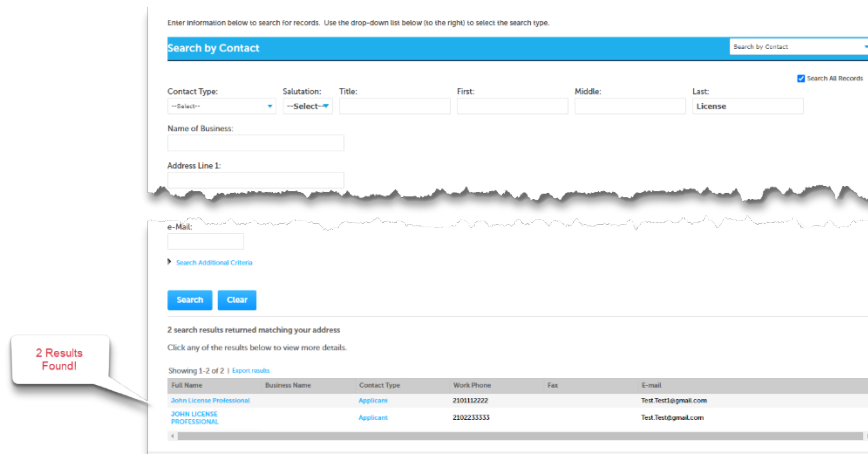


**IMPORTANT NOTE:** When searching for a contact or business name, less information will return better search results. If you enter too much information, it may not return any matches.

Search for a Contact

Start off with entering the last name ONLY (Example: John License Professional. Enter only Professional) \*

*\*If the query returns too many results, try adding the first name or a portion of the first name to narrow search results.*



**IMPORTANT NOTE:** The company/business associated with the Licensed Professional is required as a contact type when **submitting a permit application\***. Accela is looking for the match between the licensed professional and the organization **exactly** as it is registered in our system.

*\* Details regarding this process will be explained later in this handout.*

## Search for the Company/Business

Enter only part of the business name (Example: License Professional Company, LLC.  
Enter only License)

The screenshot shows a search interface with a form for entering search criteria and a table of results. The form includes fields for Contact Type, Salutation, Title, First, Middle, Last, Name of Business, License, and Address Line 1. Below the form are buttons for Search and Clear. The results table shows 2 results found, with the first result being 'License Professional Company, LLC' and the second being 'License Professional Company, LLC'. A red callout box points to the '2 Results Found!' message.

The blue font indicates a hyperlink and will navigate you to additional information. Once you have identified how the Contact, Licensed Professional and/or the Company are listed in the new system, you are ready to create your ACA Online Portal account(s). **Please note the system is sensitive to spaces, commas, periods).** Please create your new portal account EXACTLY as it appears.

The screenshot shows the search results page. It displays 2 search results returned matching the address. The results table has columns for Full Name, Business Name, Contact Type, Work Phone, Fax, and E-mail. Below the results table, there is a section for records associated with the applicant, 'JOHN LICENSE PROFESSIONAL'. This section shows a table with columns for Date, Record Number, Record Type, Description, Project Name, Expiration Date, Created By, Status, Action, and Short Notes.

Full Name	Business Name	Contact Type	Work Phone	Fax	E-mail
<a href="#">John License Professional</a>		Applicant	2101112222		Test.Test1@gmail.com
<a href="#">JOHN LICENSE PROFESSIONAL</a>		Applicant	2102233333		Test.Test@gmail.com

Date	Record Number	Record Type	Description	Project Name	Expiration Date	Created By	Status	Action	Short Notes
<input type="checkbox"/>	12/11/2020	LIC-CITY-APP20-16300011	City Licensing Application	RBC-20-00011		Caryn Moore	Closed		
<input type="checkbox"/>	12/11/2020	LIC-RBC-LIC20-17200011	City Residential Building Contractor License	RBC-20-00011	12/11/2022	Caryn Moore	Active		

If more than one match is returned and there are associated records listed, then open the associated record for the License Registration and navigate to the Contacts Tab to view the Company Contact

The screenshot shows a web interface for license records. At the top, there is a navigation bar with 'Home', 'Land Development', 'Building', and 'Fire'. Below this is an 'Advanced Search' section. The main content area displays a record for 'Record LIC-RBC-LIC20-17200011: City Residential Building Contractor License'. The record status is 'Active' and the expiration date is '12/11/2022'. There are two tabs: 'Record Info' and 'Payments'. A red message states: 'To view any current activity on this Record, please refresh the page.' Below this are sections for 'Location' and 'Record Details'. The 'Record Details' section is divided into three columns: 'Applicant', 'Licensed Professional', and 'Project Description'. The 'Applicant' column lists 'JOHN LICENSE PROFESSIONAL' with contact information. The 'Licensed Professional' column lists 'JOHN LICENSE PROFESSIONAL' with contact information. The 'Project Description' column lists 'RBC-20-00011'. Below these columns is a 'More Details' section with expandable items: 'Related Contacts', 'Company Name/Business Owner information', 'Application Information', and 'Application Information Table'. Three red callout boxes with numbers 1, 2, and 3 are overlaid on the page. Callout 1 points to the record title, callout 2 points to the 'Applicant' information, and callout 3 points to the 'More Details' section.

Home Land Development Building Fire

Advanced Search

1 Record LIC-RBC-LIC20-17200011:  
City Residential Building Contractor License  
Record Status: Active  
Expiration Date: 12/11/2022

Record Info Payments

To view any current activity on this Record, please refresh the page.

Location

Record Details

Applicant:	Licensed Professional:	Project Description:
Individual JOHN LICENSE PROFESSIONAL Primary Phone: 2101112222 Test.Test@gmail.com Mailing 1901 S Alamo San Antonio, TX, 78204 United States	JOHN LICENSE PROFESSIONAL 1901 S Alamo San Antonio, TX, 78204 Primary Phone: 2101112222 City Residential Building Cntr RBC-20-00011	RBC-20-00011

2

3

More Details

- Related Contacts
- Company Name/Business Owner information  
Organization  
LICENSE PROFESSIONAL COMPANY LLC  
Primary Phone: 2101113333  
E-mail: TEST.TEST2@GMAIL.COM  
Mailing  
1901 S Alamo  
San Antonio, TX, 78204  
United States
- Application Information
- Application Information Table

## How to Create your Online Portal Account

### Understanding Portal Accounts Relationships

The Licensed Professional (license holder) is **required** to have an ACA account. The license holder is the only one authorized to pull permits. The license holder can delegate to employees and/or authorized agents to pull permits and schedule inspections on his behalf.

Example: John License Professional is **required** to have an ACA account and this account will be the one linked to the license.

License Professional Company has 3 employees

Employee 1 will have one ACA account

Employee 2 will have one ACA account

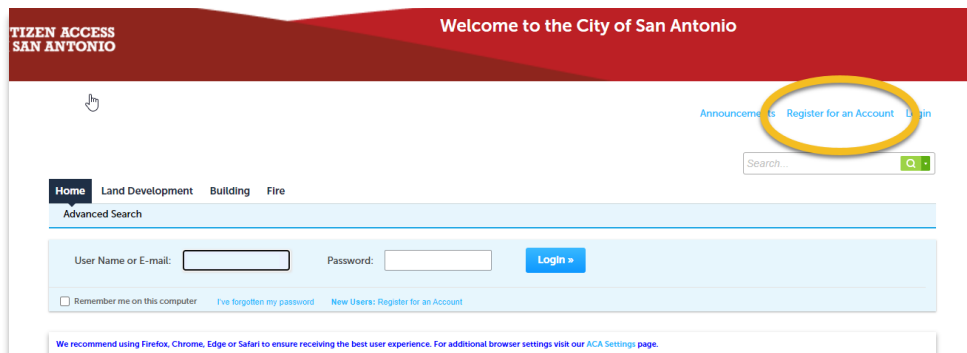
Employee 3 will have one ACA account

Once the accounts are created, John License Professional will delegate permissions to the employee(s) of the company or authorized agent(s) which will be submitting permits on behalf of the license holder. \*

*\*Details regarding this process will be explained later in this handout.*

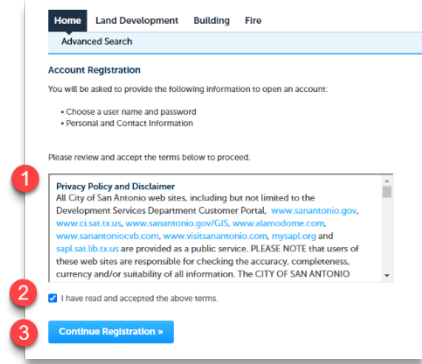
### Creating the ACA Online Portal Account

Click **Register for an Account** located on the top right side of the home page.



From the **Account Registration** page:

1. Review the Privacy Policy and Disclaimer.
2. Click "I have read and accepted the above terms."
3. Click "Continue Registration."



From the Account Registration Step 2:

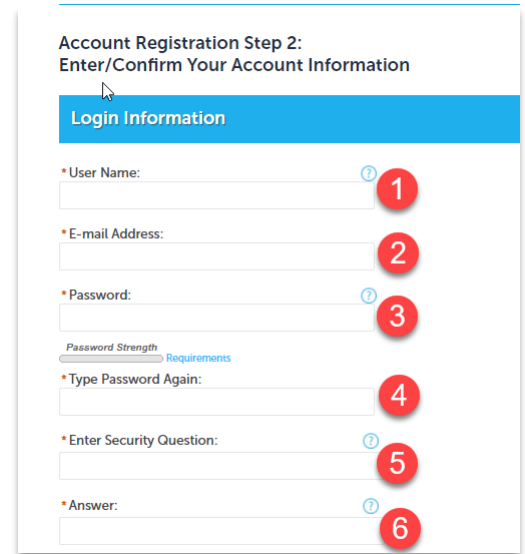
1. Enter USERNAME

This will be the user name used to login to the ACA portal.

2. Enter Your Email

The email must be unique and the same email cannot be used to create multiple ACA portal accounts.

3. Enter a Password
  - a. Minimum of 8 character(s)
  - b. Must contain at least 1 upper-case letter(s) (A, B, C, ...)
  - c. Must contain at least 1 number(s) (1, 2, 3, ...)
  - d. Must contain at least 1 special character(s)
  - e. Must not contain user name ID
4. Type in your Password Again
  - a. Must match EXACTLY to the password entered above
5. Enter Security Question:
  - a. This information will display in the event you would like to change your password.
6. Enter Answer:
  - a. You will be prompted to enter this information in the event you forget or would like to change your password.
  - b. If not entered exactly, authorization to change password will not be accepted.



Please capture the Username, Password and the answer to the security question for future use.



To enter the portal account's owner contact information, click **Add New**

1. For the Licensed Professional and employees, use **INDIVIDUAL** from the drop down
2. Click **Continue**

\* Answer: 2020

**Contact Information**

Choose how to fill in your contact information.

**Add New**

**Select Contact Type**

\* Type: Individual

Continue Discard Changes

3. This is where your contact information **MUST** be entered **EXACTLY** (including commas, periods, spaces and special characters) as it is appearing in the new system. Refer to section above [“Steps to locate Contacts in new system”](#)

**Contact Information**

\* First Name: Middle Name: \* Last Name: Suffix:

\* Primary Phone: Secondary Phone:

\* E-mail:

Fax:

**Contact Addresses**

**Add Contact Address**

To edit a contact address, click the address link.  
Required contact address type(s): Mailing

Showing 0-0 of 0

Address Type	Address	Recipient	Status	Action
No records found.				

Continue Clear Discard Changes



**IMPORTANT:** The following information **must match exactly** (including commas, periods, spaces and special characters):

- First Name
- Last Name
- Primary Phone or E-mail

**Contact Information**

\* First Name: JOHN Middle Name: Last Name: LICENSE PROFESSIONAL

\* Primary Phone: 210-111-2222 Secondary Phone:

\* E-mail: Test.Test@gmail.com

Fax:

2 search results returned matching your address  
Click any of the results below to view more details.

Showing 1-2 of 2 | Export results

Full Name	Business Name	Contact Type	Work Phone	Fax	E-mail
John License Professional		Applicant	2101112222		Test.T
JOHN LICENSE PROFESSIONAL		Applicant	2102233333		Test.T

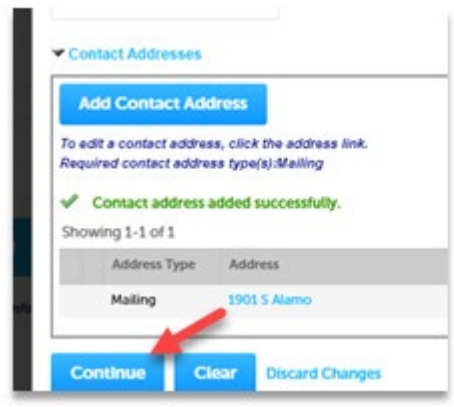
4. Navigate toward the bottom of the page to enter contact address information, you will be required to provide your mailing address.
  - a. Click on **Add Contact Address**.



- b. Select “Mailing” from the drop-down options and enter the mailing address.
  - c. Click **Save and Close**.

NOTE: Physical address is not required.

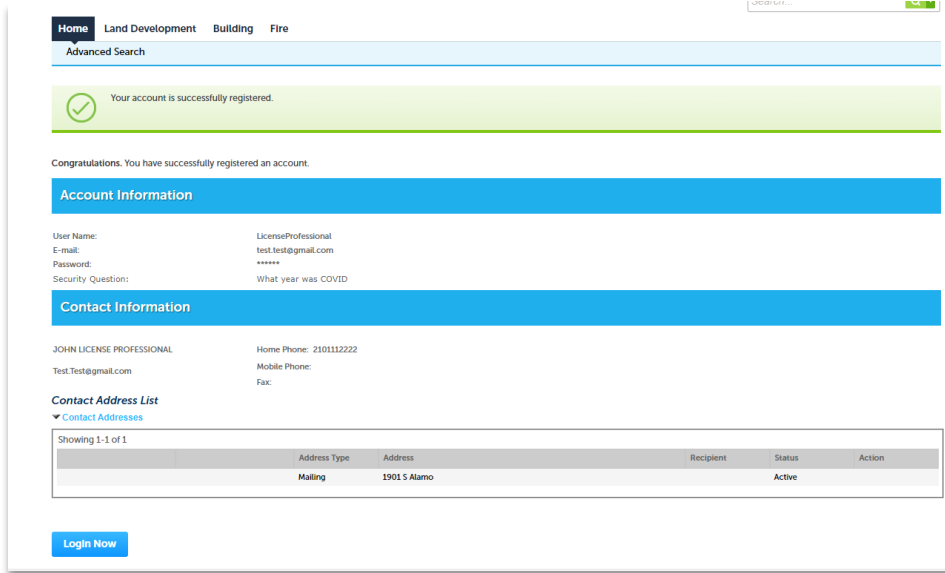
- d. The system will take you back to the Contact Information Page.
    - e. A message confirming the address was saved appears. “Contact address added successfully.”
5. Click **Continue**.



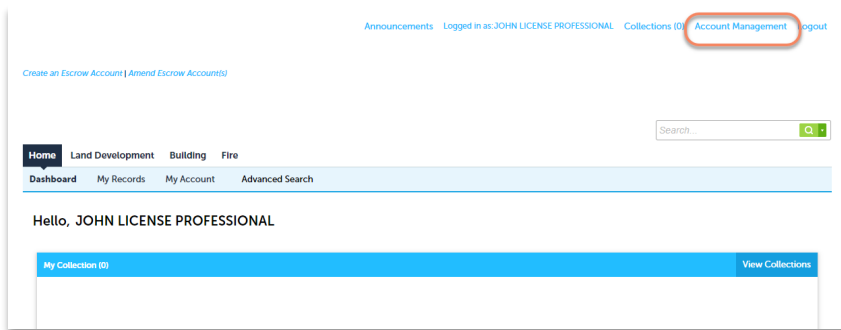
The system will confirm a contact has been added to the ACA portal account with the following message “Contact added successfully.”

6. Click **Continue Registration**.

The system will display a message confirming the registration is complete. **“Congratulations. You have successfully registered an account.”**

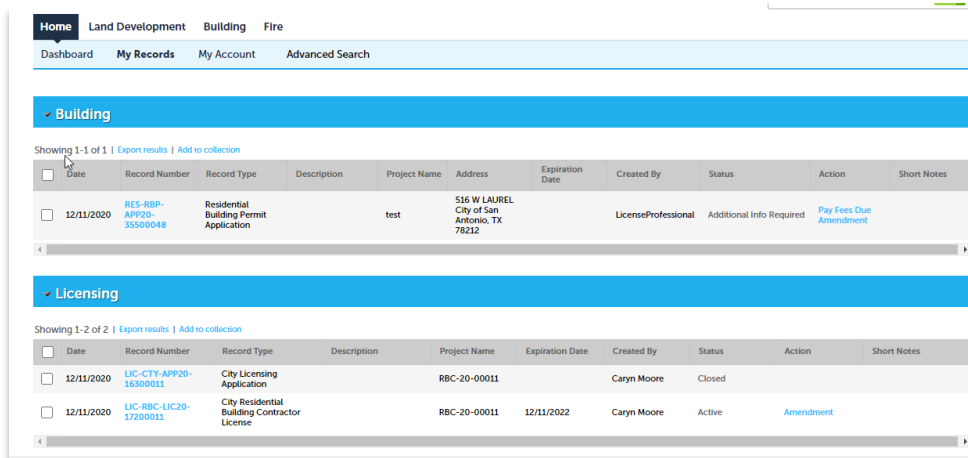


7. Click **Login Now**



8. Click on **My Records**

9. **Click** on the Building, Licensing, etc. sections to expand the sections. Any applications/records found in the new system for this contact will display here.



- a. If the ACA account is for the Licensed Professional, navigate to the **Account Management** page located on the top right-hand portion of the page and **click** the link to open.
- b. Navigate to the **License Information** section to confirm the license is linked/associated to this ACA account. License information should appear as shown below (status should be approved).

**Manage Your Account**  
 Your current account information is shown below. Click an Edit button to update information within a section.

**Account Type**

Licensed Professional Account

**Login Information** Edit

User Name: LicenseProfessional  
 E-mail: test.test@gmail.com  
 Password: \*\*\*\*\*  
 Security Question: What year was COVID

**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 1-1 of 1 | [Export results](#)

State License #	License Type	Issued On	Expired Date	Status	Action	Country
RBC-20-00011	City Residential Building Cntr	12/11/2020	12/11/2022	Approved	<a href="#">Actions</a> ▼	

**Contact Information**

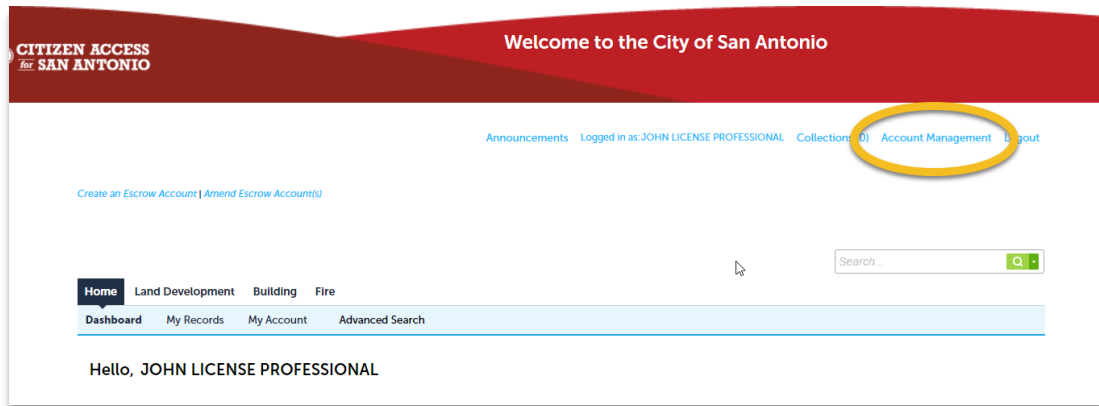
Showing 1-1 of 1 | [Export results](#)

First Name	Last Name	Business Name	Contact Type	Status	Action
JOHN	LICENSE PROFESSIONAL		Individual	Approved	<a href="#">Actions</a> ▼

## Delegating Permissions

Once everyone creates their ACA portal accounts, the Licensed Professional will need to log into their account (the one with the license listed in the Account Management page) and delegate permissions to the individuals he authorizes to submit permits on their behalf utilizing their license.

1. **Click** on the Account Management shown on the top right portion of the home page.



2. **Navigate** to the **Delegates** section located at the bottom of the page.
3. Click **Add a Delegate**



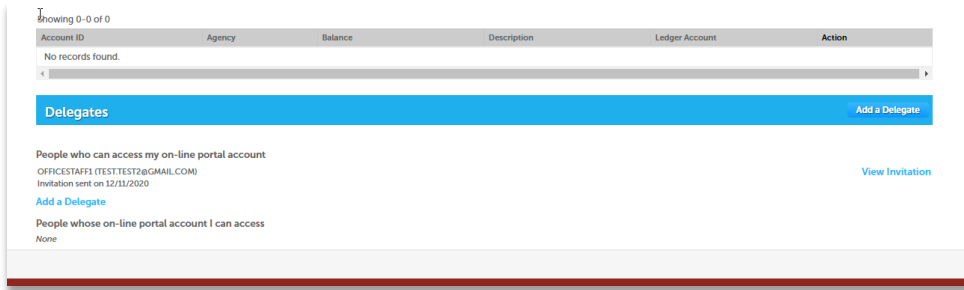
Enter the following delegate information:

- a. Name – **Enter** name of the individual/organization you are granting permissions. This should be name of the contact used to set up the portal account.
- b. E-mail Address – **Enter** the address used to register their ACA Online Portal account.
- c. **Check** one or more permission categories you wish to grant the user.
- d. **Check** I'm not a robot.
- e. **Click** Invite a Delegate.

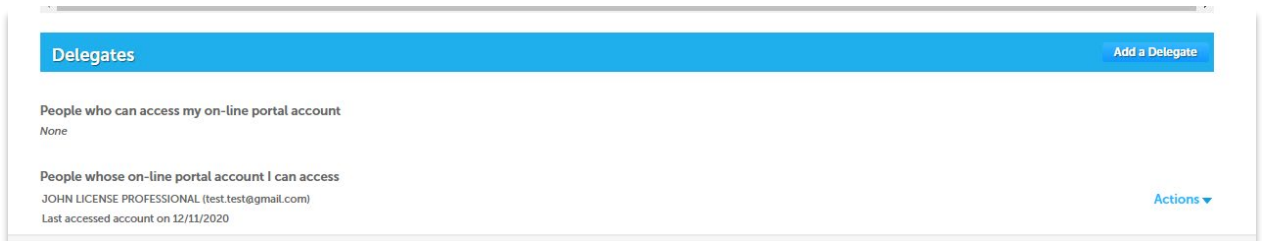
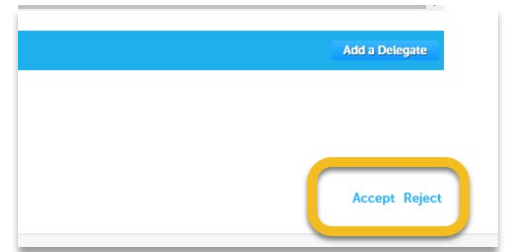
A screenshot of the 'Add a Delegate' form. The form has a title 'Add a Delegate' and a subtitle 'Enter the name and e-mail address of the person to whom you would like to grant delegate access to your account.' Below the subtitle, there are two input fields: 'Name' (labeled 'a') and 'E-mail Address' (labeled 'b'). Below the input fields, there is a section titled 'Set Delegate Permission' with a subtitle 'Delegates can view records across all categories unless you choose to restrict them to specific categories.' Below the subtitle, there is a checkbox labeled 'View Records in all categories' (labeled 'c'). Below the checkbox, there is a list of permission categories with checkboxes: 'Create Applications in all categories', 'Renew Records in all categories', 'Amend Records in all categories', 'Manage Inspections in all categories', 'Manage Documents in all categories', and 'Make Payments in all categories'. Below the list, there is a checkbox labeled 'I'm not a robot' (labeled 'd') and a reCAPTCHA logo. Below the 'I'm not a robot' checkbox, there is a blue button labeled 'Invite a Delegate' (labeled 'e').

Please ensure the delegate is granted the correct permissions to perform the necessary functions on behalf of the delegate.

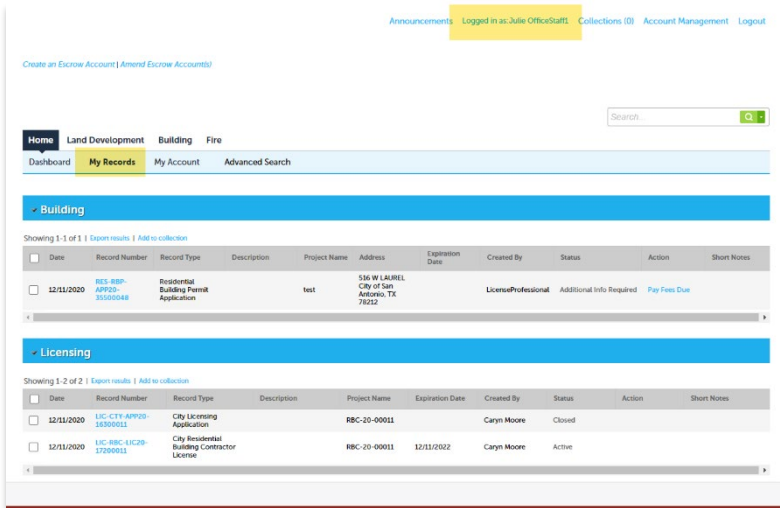
- After adding the delegate, the delegate name/information will display as shown below.



- The delegate must log into their ACA portal account and accept the invitation from their portal account. As a delegate, **Click** on the Account Management section.
- As a delegate, **navigate** to the Delegates section and accept the invitation.



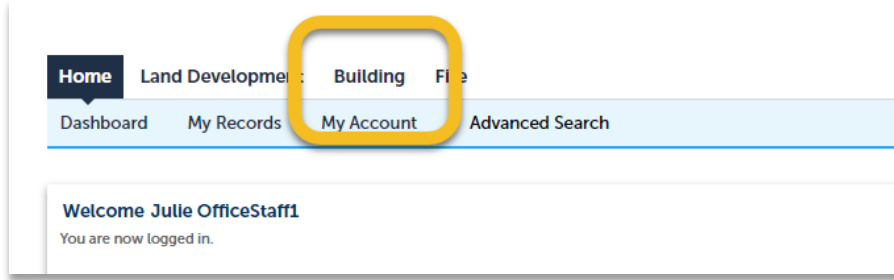
- After the delegate accepts the invitation, the delegate is able view all the Licensed Professionals records in **My Records**.



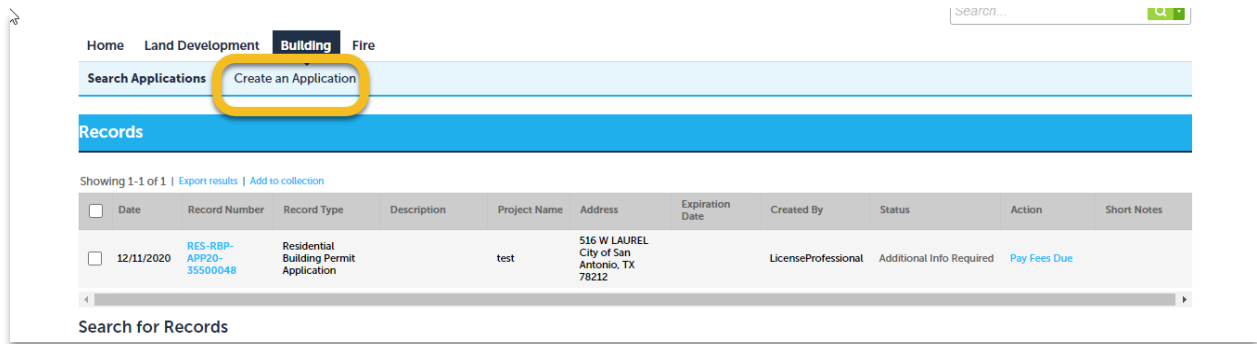
After completing these steps, the delegate has access to submit permit applications on behalf of the Licensed Professional. Please ensure the delegate is granted the correct permissions to perform the necessary functions on behalf of the delegate.

# Creating your Applications in ACA

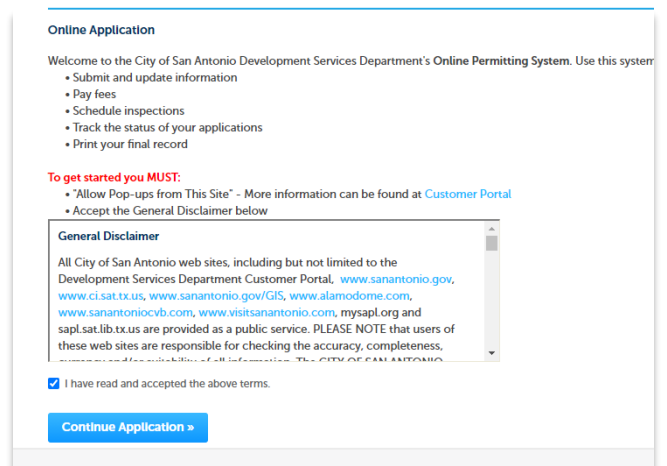
1. To start an application for a building permit, **click** on the Building module



2. Select "Create Application"



3. Review the General Disclaimer and **check** "I have read and accepted the above terms."
4. **Click** Continue Application





## Create this Application Page as

### Select who will create the Application

1. After you accept the terms you will be prompted to tell us who is submitting the permit application.
  - a. If you are submitting a permit application that requires the Licensed Professional, it is the Licensed Professional that must be the applicant of the permit request.
  - b. If the permit application DOES NOT require a Licensed Professional OR you are logged in as the Licensed Professional, then select “Myself.” If you are not the license holder, select “Another Person” and choose the License Professional you are submitting on behalf.

Home Land Development **Building** Fire

Search Applications Create an Application

Create this application as **1**

Myself

Another person \* JOHN LICENSE PROFESSIONAL **2**

Select a License

Select a license for this record from the list below. The available permit record type(s) is determined by the type of record.

\*Licenses:

City Residential Building Cntr RBC-20-00011 **3**

JOHN LICENSE PROFESSIONAL  
1901 S Alamo  
San Antonio, TX 78204

Primary Phone: 2101112222  
Mobile Phone:  
Fax:  
City Residential Building Cntr  
RBC-20-00011

Continue Application »

2. The “Select a License” section will display a list of licenses that *John License Professional* has on his account. It is important to select the appropriate license for the permit type you are submitting on behalf of the Licensed Professional.

From the drop down, **select** the appropriate license type required for the permit application.

3. Press **Continue Application**. This system will display the list of application permit types available.
4. From the application list, choose the application and click **Continue** at the bottom of the page.

Home Land Development **Building** Fire

Search Applications Create an Application

Select a Record Type

Choose one of the following available record types. For assistance or to apply for a record type not listed below please contact us.

Search

<input type="radio"/> Annual Maintenance Permit Application *	<input type="radio"/> Residential Building Permit Application *
<input type="radio"/> Certificate of Occupancy Application	<input type="radio"/> Residential Fence Application *
<input type="radio"/> Commercial Project Application	<input type="radio"/> Residential Improvements Permit Application *
<input type="radio"/> Demolition Pedestrian Protection Application *	<input type="radio"/> Sidewalk-Curb Application *
<input type="radio"/> Fire Damage Assessment Request	<input type="radio"/> Sign Permit Application *
<input type="radio"/> LSR MEP Permit Application *	<input type="radio"/> Tree Affidavit/Permit Application
<input type="radio"/> Manufactured Home Application	
<input type="radio"/> MEP Trade Permits Application *	
<input type="radio"/> Minor Building Repair Application *	

**\* Applicant must be the License Professional**

Continue Application »

*Note: The types of permits that require Licensed professional are identified on the left with an asterisk (\*).*

## Property Information Page

### Searching for Address/Parcel Page

The first page that displays on every permit application is the **Property Information**. This is where you provide the site address for the project.

You can search by either Address or Parcel. Once the system makes a match, the system will populate the Address/Parcel and Owner related information into your permit application.

When searching for an address, it is recommended to enter minimal information and let the system return one or more matches. Putting too much information may result in no matches.

Example: 1900 Blue Crest Lane

Residential Building Permit Application

1 Property Information 2 General Information 3 Contact Information

Step 1: Property Information > Property  
Physical Address is preferred.

Address

Please make sure you enter in Street No and Street Name when searching for an address for the best results.

Street No.: 1900 Street Name: Blue Street Type: --Select--

Unit/Suite: Level: Building:

City: State: --Select-- Zip: [One Stop Zoning Map](#)

Search Clear

1. Enter **Street No.** 1900 and the **Street Name** Blue
  - a. If an exact match is found, the system will return the information and fill in the remaining information to include the corresponding Parcel and Owner information.
  - b. If the system finds more than one match, it will display a **Result List** with options. **Scroll** and select from the available options or return to the search option to narrow your search results.
  - c. Accela is linked to our GIS service. If no matches are returned, it is recommended to use the One Stop Zoning Map to locate the address or parcel. You will find a hyperlink to the map in the Address Section [One Stop Zoning Map](#).
2. Once the system populates the Address, Parcel and Owner information in your application, click **Continue Application**.

## General Permit Information Page

Each record type will have a section where you indicate the type of permit you are requesting (except for Residential Fence and Sidewalk Curb).

Below are the types of permits that are generated for each of the application types:

- Annual Maintenance
  - Electrical Maintenance
  - Mechanical Maintenance
  - Plumbing Maintenance
- Demolition Pedestrian Protection Application:
  - Demolition Permit
  - Pedestrian Protection Permit
- LSR MEP Permit Application
  - LSR Electrical Permit
  - LSR Mechanical Permit
  - LSR Plumbing Permit
- MEP Trade Permit Application
  - Electrical Completion Permit
  - Electrical General Permit
  - Electrical Reconnect Permit
  - Electrical TOPS Permit
  - Mechanical Completion Permit
  - Mechanical Permit
  - Plumbing Backflow Permit
  - Plumbing Completion Permit
  - Plumbing Gas Permit
  - Plumbing General Permit
  - Plumbing Irrigation Permit
  - Plumbing Medical Gas Permit
  - Plumbing MRFPS Permit
  - Plumbing Reclaim Water Permit
  - Plumbing Sewer Permit
  - Solar - Photovoltaic Permit
- Minor Building Repair Application
  - Foundation Repair Permit
  - Re-Roof Permit
  - Residential Repair Permit
  - Minor Commercial Repair Permit
- Residential Building Permit Application
  - Residential New Building Permit
  - Residential Accessory and Additions Permit
  - Residential Foundation Permit
  - Residential Accessory Dwelling Permit

- Residential Improvement Permit Application:
  - Accessory Building Permit
  - Carport Permit
  - Covered Patio or Porch Permit
  - Deck Permit
  - Home Addition Permit
  - Swimming Pool or Spa Permit
- Sign Permit Application
  - Across the Street Banner Permit
  - Avenue Sign Permit
  - Event Sign Permit
  - Feather Sign Permit
  - Inflatable Sign Permit
  - Off Premise Billboard Sign Permit
  - On Premise Sign Permit
  - Portable Sign Permit
  - Temporary Weekend Sign Permit

Each permit application type displays different follow-on questions/section(s) based on the specific information needed.

1. **Select** the type of permit application and complete all required fields.
2. **Click** Continue Application.
3. Once all permit application questions are completed, the system will navigate you to the **Applicant Information Section**.

### Applicant Information Page

This page consists of 3 sections:

1. Applicant
2. Copy of Applicant Contact Information
3. Property Owner

#### Applicant

For applications requiring the Licensed Professional, the Licensed Professional will be the Applicant. It is important the Licensed Professional's information displays under the Applicant information, as shown.



**IMPORTANT:** If this is incorrect, then read "[Select who will create the Application](#)" and return to step 1 to ensure the steps were performed correctly.

Step 3: Contact Information > Applicant  
*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".*

Applicant

JOHN LICENSE PROFESSIONAL  
 Test.123@gmail.com  
 Primary Phone: 2311122222  
 Secondary Phone:  
 Fax:  
 View

▼ Contact Addresses

Required contact address type(s): Mailing

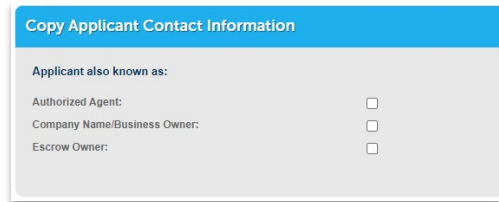
Showing 1-1 of 1

Address Type	Recipient	Address	Action
Mailing		1901 S Azusa	

## Copy Applicant Contact Information

This section is requesting what other roles the Licensed Professional may take on this application. The types in this section may vary by record type, but the primary types are:

- Authorized Agent
- Company Name/Business Owner
- Escrow Owner



Authorized Agent and Escrow Owner is used primarily for Escrow. If you are not paying by Escrow, do not check these.

If you are paying by Escrow, then check Authorized Agent and/or Escrow Owner for the Licensed Professional. The Licensed Professional must be at least listed as an Authorized Agent for using the Escrow account. Please refer to the [Citizen Access Create an Escrow Account](https://www.sanantonio.gov/DSD) at <https://www.sanantonio.gov/DSD> and click on BuildSA / Customer Resources

If any Also Known As is checked, it simply creates the License Professional Contact Record on the following page with the appropriate type.

## Property Owner

Since this document is created primarily for Licensed Professionals and companies interested in submitting permit applications, this question should always be checked NO.



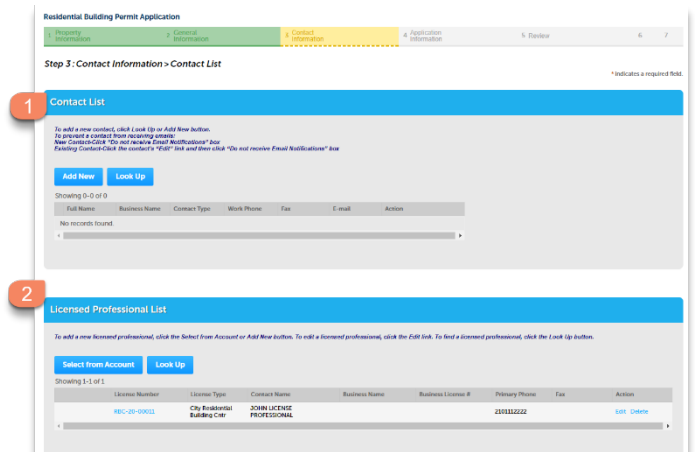
After completing this section click **Continue Application**.

## Contact List Page

The Contact List Page is to allow you to provide additional individuals that are associated to the Permit. This page consists of 2 sections.

- Contact List
- Licensed Professional List

For permits that require the Licensed Professional the Licensed Professional will be displayed in the Licensed Professional List section.





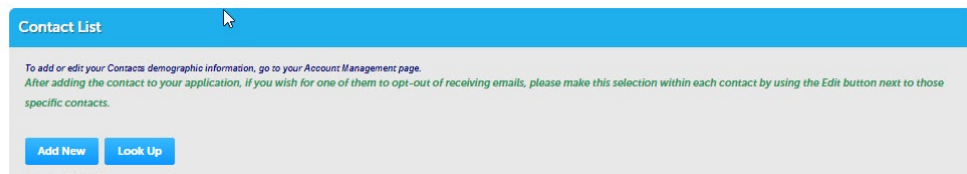
**IMPORTANT:** If the Licensed Professional Information does not display, then review [“Select who will create the Application”](#) and return to Step 1 to ensure this step was performed correctly, if not, we recommend you restart the application.

If you are paying fees from an Escrow Account and the Licensed Professional is not the owner of the Escrow Account, then you will want to also add the person who owns the account in the Contact List.

### Adding Contacts to the Application

Permits requiring a Licensed Professional must also include a **Company Name/Business Owner** contact type to be added in the Contact List section of the permit application. The association between the Licensed Professional and the Company is part of the license registration application submitted to Development Services and must match what is on record.

To add a contact to the permit always use **Look Up first**, do **not** use **Add New** unless you are unable to find the contact.



The system requires the exact company registered with the Licensed Professional to be added the permit application. If this does not match, you will not be allowed to continue and will receive the following message:

*"Please add the Company associated with the Licensed Professional registered with the City of San Antonio."*



**IMPORTANT:** If you have pulled permits with Development Services in the past, you should be in Accela and should **not** use **Add New**. Always start by using Look Up first.

## Locating Existing Contacts in the System

Clicking **Look Up** will prompt the Look Up Contact page.

When searching for individuals or a company, we recommend entering minimal information and let the system return one or more matches. Putting too much information may result in no matches.

- Company Example: License Professional Company, LLC
  - Individual Example: John License Professional
1. For a Company: Enter License. For an Individual: Enter Last name only
    - a. If too many results are returned, then for a Company: enter License Professional. For an Individual: enter Last name and First Character of First name
    - b. Once you are returned results, check the First and Last name or Organization Name, Primary Phone and Email.



**IMPORTANT** The Company must match **EXACTLY** (including commas, periods, spaces and special characters) as they are registered with the Licensed Professional. Use the [Steps to locate Contacts in new system](#) section of this document to check exactly how the company is listed.

In the example below, the system returned Company License Professional twice. One with no comma, one with a comma. When determining if the Company Contact is a match, it is important you consider all characters including commas, periods, spaces and special characters.

Organization Name	Contact Type	Work Phone	Fax	E-mail
LICENSE PROFESSIONAL COMPANY LLC	Organization			TESTTEST2@GMAIL.COM
License Professional Company, LLC	Organization			TESTTEST2@GMAIL.COM

After selecting the correct company contact, the system will return the contact address as registered with Development Services.

On this page you **must** identify the Type of Contact for this individual and check the mailing address as shown below (at a minimum). Contact type choices vary by record type, but common ones are:

- Authorized Agent
- Company Name/Business Owner
- Escrow Owner
- Property Owner

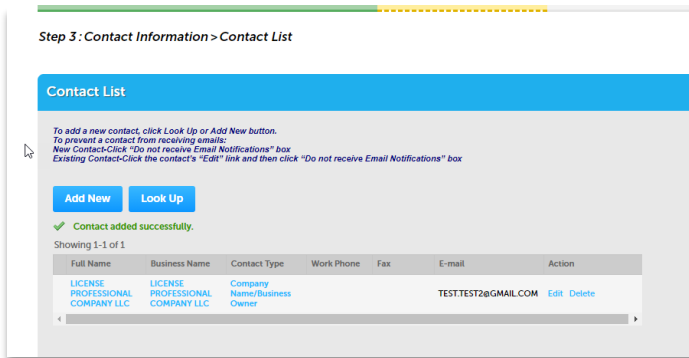
As stated earlier, Authorized Agent and/or Escrow Owner refer to Escrow Accounts and are needed only if you're paying by escrow. Please refer to the Citizen Access Create an Escrow

Account at <https://www.sanantonio.gov/DSD> and click on BuildSA / Customer Resources.

Address Type	Recipient	Address
<input checked="" type="checkbox"/> Mailing		1901 S Alamo

2. **Click** Continue.

The system will add the individual in the Contact List section of this page with the selected Contact Type.

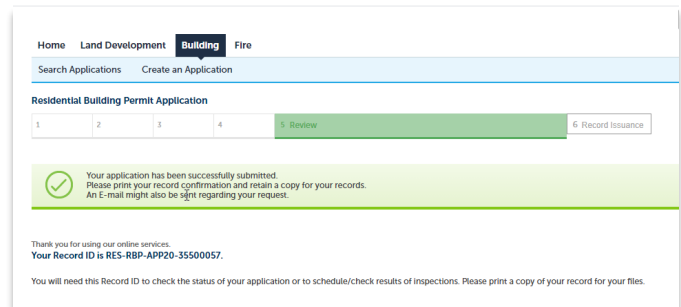


3. Once all required contacts are entered, **Click** Continue Application.

4. Complete the application and submit.

Note: Each application type will navigate your through different sections and information required to complete. You may or may not be required to submit documents or pay fees prior to submit based on the permit application type. This information is not covered in this document.

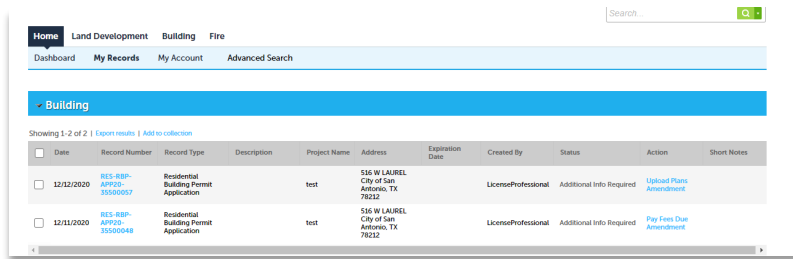
Upon successful submission of your request you will receive the Record Confirmation Page that will provide you the record number for future reference. This record will now be viewed in the “My Records” section of the ACA Online Portal where you can track its progress and the issuance of your permit.





## Viewing Application Progress

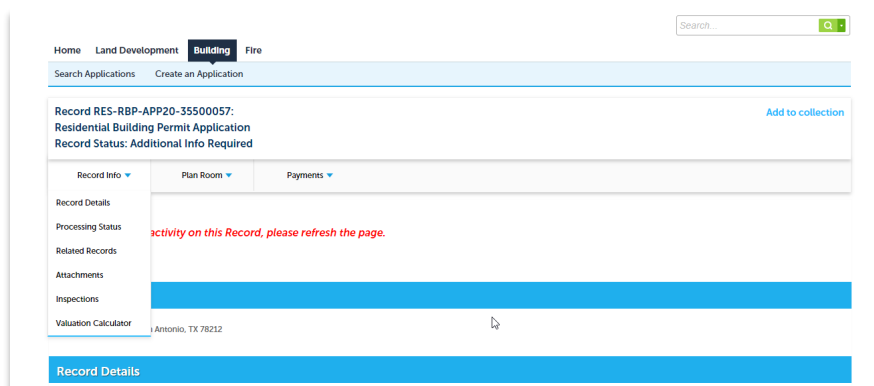
All your records that have been submitted can be viewed in “My Records”. Click “Home” to see “My Records” option on the menu bar.



The Application Status will inform you of the current status of your request.

- **Under Review** – Development Services is reviewing the request
- **Additional Information Required** – Development services is requiring additional information from you to continue their Review
- **Fees Due** – Additional Fees are required to be paid before the request can be completed or continued.
- **Issued or Pending Issuance** – Your request has been approved and permit created. Another record for the Permit will be created and viewed in My records.
  - **Issued** – You can begin scheduling your inspections
  - **Pending Issuance** – You are required to pay Permit fees before scheduling your inspections.
- **About to Expire** – There has not been any activity on your request by you or Development services for 150 calendar days. If action is not taken, your request will be canceled in 180 calendar days and you will be required to resubmit.
- **Inactive** – There was no activity on your request by you or Development Services for 180 Days. You are now required to resubmit.

All records have a blue hyperlink that will navigate you to Record Details where you can track progress, upload additional documents requested by the city, schedule inspections (Inspections are located on the Permits ONLY) or pay any outstanding fees.



Each record type may have different options and therefore, this information is not covered in this document.

## Managing Permits

After the application has been approved by Development Services it will be updated with a status of Issued or Pending Issuance and a new record will be created for the Permit(s) with status of Pending Issuance or Active.

Date	Record Number	Record Type	Description	Project Name	Address	Expiration Date	Created By	Status	Action	Short Notes
12/02/2020	RES-RBP-APR20-2000007	Residential Building Permit Application		test	156 W LAUREL City of San Antonio, TX 78212		LicenseProfessional	Issued	Amendment	
12/02/2020	RES-RBP-APR20-36600044	Residential New Building Permit	Building No: Unit No: Unit 1		156 W LAUREL City of San Antonio, TX 78212		LicenseProfessional	Fees Due	Pay Fees Due Amendment	
12/02/2020	RES-RBP-APR20-36600045	Residential New Building Permit	Building No: Unit No: Unit 2		156 W LAUREL City of San Antonio, TX 78212		LicenseProfessional	Active	Amendment	
12/02/2020	RES-RBP-APR20-36600046	Residential New Building Permit	Building No: Unit No: Unit 1		156 W LAUREL City of San Antonio, TX 78212		LicenseProfessional	Fees Due	Pay Fees Due Amendment	
12/11/2020	RES-RBP-APR20-36600048	Residential Building Permit Application		test	156 W LAUREL City of San Antonio, TX 78212		LicenseProfessional	Additional Info Required	Pay Fees Due Amendment	

- **Active:** You can begin scheduling your inspections
- **Pending Issuance** – You are required to pay Permit fees before scheduling your inspections.
- **Fees Due** – Additional Fees are required to be paid before the request can be completed or continued.

## Scheduling Inspections

To schedule an inspection online, you must be authorized. Only certain individuals on the permit application or permit can schedule an inspection and must fall into one of the following roles:

- Licensed Professional (by Trade)
- Applicant (excluding Commercial and Residential New Building)
- General Contractor

These individuals must be on the Permit in order to schedule inspections **or they must be a delegate of the authorized individual.** You may include them on the original application at submission (if known) or you may add them after the permit has been issued.

To add individuals or Licensed Professionals to your permits you can use the Add/Remove Contact Amendment application record. This record is available by navigating to the Record Details of the Permit and clicking on Create Amendment.

Select an Amendment Type

Choose one of the following available amendment types.

If you are a delegate on a record and do not see the "Add/Remove Contact" or "Withdrawal or Refund Request" amendment types, please click Amendment Creation to create the amendment application.

Add/Remove Contact

Withdrawal or Refund Request

[Continue Application >](#)

Home Land Development Building Fire

Search Applications Create an Application

Record RES-RBP-PMT20-36600045:  
Residential New Building Permit  
Record Status: Active

Record Info Payments

To view any current activity on this Record, please refresh the page.

**Location**

156 LAUREL City of San Antonio, TX 78212

**Record Details**

**Applicant:**  
Individual  
JOHN LICENSE PROFESSIONAL  
Primary Phone: 2101112222  
Test.Test@gmail.com  
Do not receive Email Notifications: No  
Mailing  
1501 S Alamo  
San Antonio, TX, 78204  
United States

**Licensed Professional:**  
JOHN LICENSE PROFESSIONAL  
1501 S Alamo  
San Antonio, TX, 78204  
Primary Phone: 2101112222  
City Residential Building Crew RBC-20-00011

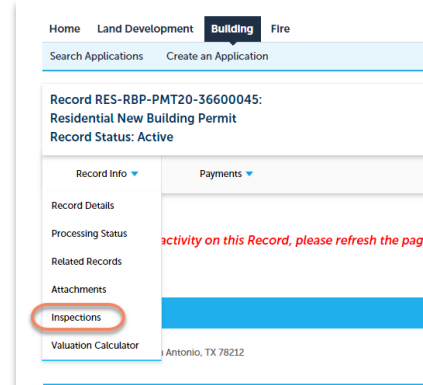
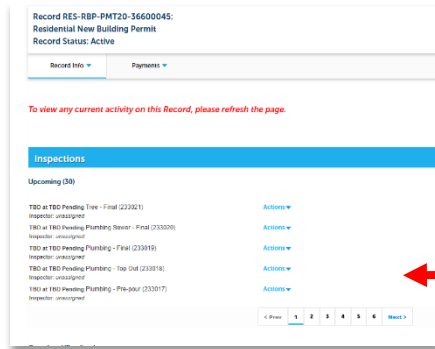
**Project Description:**  
Building No: Building 2; Unit No: Unit 2

**Owner:**  
VIA METROPOLITAN TRANSIT  
PO BOX 124896 SAN ANTONIO, TX, US, 78212-0489

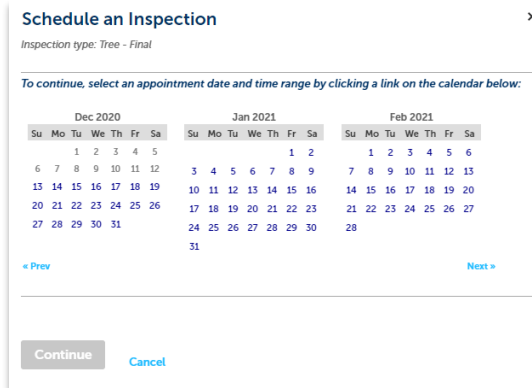
More Details  
[Create Amendment](#)

Refer to [Adding additional Contacts and/or License Professionals](#) section of this document for this process.

An authorized individual(s) can access the inspections by navigating to Record Details and selecting inspections.

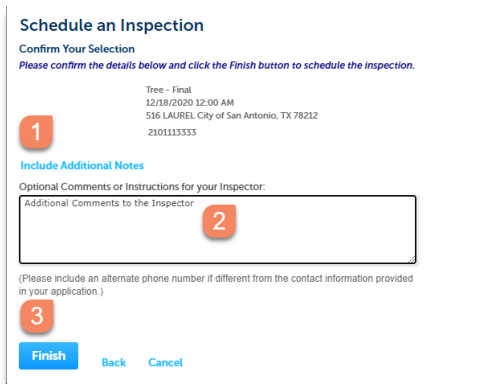
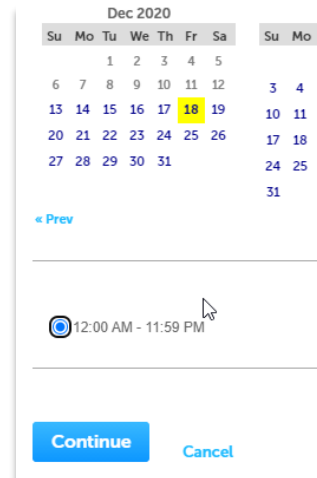


Click the Action and select Schedule:



Once the Date is selected select 12:00 AM-11:59PM to enable the Continue button to complete the scheduling of the inspection.

On the last page there is an option to “Include Additional Notes” to the inspector. Click the hyperlink to add any additional information before clicking Finish.



Once Scheduled, the TBD will be updated to the Schedule Date requested.

Inspections	
Upcoming (30)	
TBD at TBD Pending Building - Frame Tie Down/Wind Bracing (232775) Inspector: unassigned	Actions ▼
TBD at TBD Pending Building - Frame Beam and Soffit (232774) Inspector: unassigned	Actions ▼
TBD at TBD Pending Building - Foundation with Letter (232773) Inspector: unassigned	Actions ▼
12/14/2020 at TBD Scheduled Tree - Preliminary (232772) Inspector: Rosario Munoz	Actions ▼
12/18/2020 at 12:00 AM Scheduled Tree - Final (233021) Inspector: Rosario Munoz	Actions ▼

At this point you can Reschedule or Cancel these inspections by clicking on Actions.

Inspector: Rosario Munoz  
12/18/2020 at 12:00 AM Scheduled Tree - Final (233021)  
Inspector: Rosario Munoz

Actions ▼

- View Details
- Reschedule
- Cancel

1



**IMPORTANT** Inspections cannot be scheduled or rescheduled on the day the inspection is scheduled to be performed. This process did not change, you must call Development Services for same day cancellations.

## Managing Contacts and/or Licensed Professionals

An Applicant, Delegate or General Contractor can use the Add/Remove Contact amendment record to add and/or remove a licensed professional or contractor from their permits. Adding and/or removing individuals from the permit will remove or add authorization for these individuals to perform certain functions.



**IMPORTANT:** The Licensed Professional and the associated Company Name/Business Owner must both exist in the permit.

**Example 1:** A General Contractor hires the Mechanical, Electrical or Plumbing (MEP) subcontractor(s) on a permit. The General Contractor will use the Add/Remove Contact amendment record to add the Company in the Contact section and the Licensed MEP Professional to the Licensed Professional List section of the permit. This process does not require a review by Development Services. The subcontractor(s) will be immediately added to the permit. Once the Licensed Professional is added to the permit and the MEP fees are paid, the MEP subcontractors can schedule their respective trade inspections.

**Example 2:** If the General Contractor needs to replace a MEP subcontractor, they can use the Add/Remove Contact amendment record to remove the original MEP subcontractor and add the new one. The Company Name/Business Owner contact must be added in the Contact Section and the Licensed Professional to the Licensed Professional List section. Although this action will require a review by Development Services, you will not be required to obtain a completion permit for the outstanding work.

**Example 3:** The Applicant did not add a General Contractor at submittal or replaces the General Contractor throughout the process, the Applicant can use the Add/Remove Contact amendment record to add or replace the General Contractor to the permit.

1. To start the Add/Remove Contact amendment record navigate to the Record Details section of the permit and click on Create Amendment.

The screenshot shows a web interface for permit management. At the top, there are two dropdown menus: 'Record Info' and 'Payments'. Below these are two blue navigation bars: 'Work Location' and 'Record Details'. The 'Record Details' section is expanded, showing two columns of information: 'Applicant' and 'Project Description'. The 'Applicant' column lists details for Patricia Cavazos, including her primary phone number (210-207-0547), email (Patricia.cavazos@sanantonio.gov), mailing address (1901 S. Alamo, San Antonio, TX, 78204, United States), and physical address (1901 S. Alamo, San Antonio, TX, 78204, United States). The 'Project Description' column lists 'Prod Validation'. Below the applicant information, there is a 'More Details' link with a right-pointing arrow. At the bottom left of the 'Record Details' section, there is a blue button labeled 'Create Amendment', which is highlighted with a red arrow pointing to it from the right.

2. **Select** the Add/Remove Contact amendment record application.

Home Land Development Building Fire  
 Dashboard My Records My Account Advanced Search  
 Select an Amendment Type  
 Choose one of the following available amendment types. For assistance or to apply for an amendment type not listed below please contact us.  
 Search  
 Add/Remove Contact  
 Withdrawal or Refund Request  
 Continue Application »

3. **Click** Continue Application.
4. **Complete** the application details.

Note: The **Record ID for Requested Change** field will be pre filled from the Parent record which change will be applied. This field is disabled from update.

**Enter** the Reason for Change and Description of change.

5. **Click** Continue.

Step 1: Change Information > Change Information  
 Custom Fields  
 CHANGE INFORMATION  
 \* Record ID for Requested Change: RES-RBP-PMT20-3660004  
 \* Reason for Change: Adding License Professional so they can schedule their inspections on this permit.  
 \* Description of Contact changes being requested: Adding John License Professional Electrical license.

## Adding/Removing Contacts

The next page displays a list of contacts that are already on the permit.

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  
 Showing 1-2 of 2  

Full Name	Business Name	Contact Type	Work Phone	Fax	E-mail	Action
JOHN LICENS PROFESSIONAL		Applicant	210223333		Test@Test@gmail.com	Edit Delete
LICENS PROFESSIONAL COMPANY LLC	LICENS PROFESSIONAL COMPANY LLC	Company Owner			TESTTEST2@GMAIL.COM	Edit Delete

 Save and resume later Continue Application »

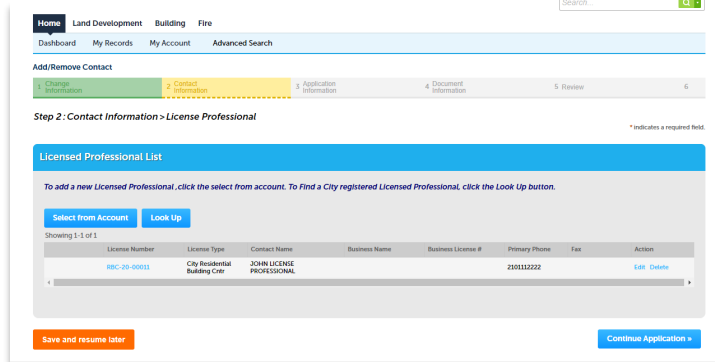
6. **Remove** any of the contacts that need to be removed by selecting **Delete** or add additional Contacts (Use Look Up).
7. If there are no additional changes, click **Continue Application**.

NOTE: A contact type of "General Contractor" will grant access for this individual to add the Licensed Professionals to the permit for the Electrical, Mechanical and Plumbing inspection work.

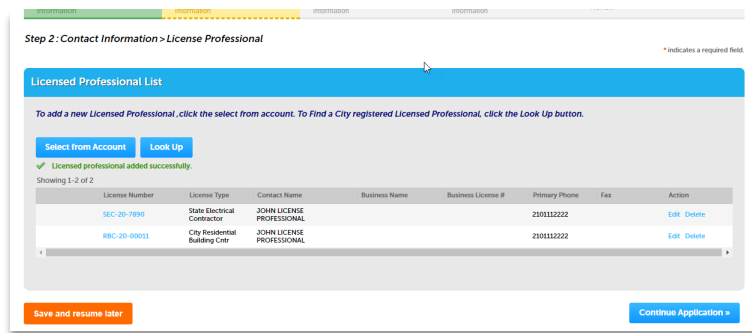
## Adding/Removing Licensed Professionals

The next page is Step 2. Licensed Professional(s) already on the permit will display here. **Please note:** Licensed Professionals must be registered with the City and the system does not display the Add New function for Licensed Professionals.

8. The Licensed Professional List section is used by the General Contractor to add the Licensed Professional(s) for the Mechanical, Electrical or Plumbing work. Once these individuals are added to the permit, they will be authorized to schedule their respective trade inspections.
9. **Remove** any of the Licensed Professionals you need to remove by selecting **Delete** or add additional Licensed Professionals by selecting Look Up.



**IMPORTANT:** If you have done work with Development Services in the past, then you are already known and should never use Add New and always locate (Look Up) the individual in our system. For best practices for locating individual's referenced in section [Locating Existing Contacts in the System](#) of this document above.



Example shown: John License Professional Electrical License has been added. **Click** Continue Application.

The next page is to describe the scope of work completed. This is ONLY required if removing a License Professional.

If you remove a Licensed Professional

1. **Check** the Licensed Professional you are removing
2. **Click** Edit and enter the Scope of work completed.

**PROFESSIONALS INFORMATION**

Professional License ID: RBC-20-00011

Licensed Professional Full Name: JOHN LICENSE PROFESS:

License Type: City Residential Building C

Scope of Work Completed by LP being removed:

Add or Remove LP: None

Submit Cancel

If you are not removing a Licensed Professional **click** Continue Application and submit your request.

The record can be viewed in the **“My Records”** section of the ACA Online Portal in the **“Amendments”** section. Here you can track the progress of your request.

You can also navigate to your permit application or permit to review the updated contact information.

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Building

Amendments

Showing 1-1 of 1 | Export results | Add to collection

<input type="checkbox"/>	Date	Record Number	Record Type	Description	Project Name	Expiration Date	Created By	Status	Action	Short Notes
<input type="checkbox"/>	12/12/2020	AMD-CONTACT-20-11000121	Add/Remove Contact					LicenseProfessional	Completed	

Building

Licensing