

Permitting System Help Guides

TOPIC: How to Make an Online Deposit to a Trust Account *Accela Citizen Access (ACA) is the online tool for external public users to check the status of permits, conduct research, and make online deposits to Trust Accounts. Records and Services are segregated by department with each department having their own block of available services. This Help Guide focuses on the process of making an online deposit to Discretionary Project Trust Account.*

To utilize the Trust Account online deposit service, customers must have a Registered ACA User Account. If not, the user must create an account. Once an Registered ACA User Account has been associated to a Trust Account—or accounts—the user can begin making online deposits to the respective Trust Accounts.

One-Time Initial Setup of a Registered ACA User Account:

1. Go to <https://publicservices.sdcounty.ca.gov/citizenaccess/> and click the Register for an Account link. Complete the series of questions to complete the registration process.



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2. Once registration has been completed, send an email to LUEGTrustAccts@sdcounty.ca.gov and provide the following information.
 - a. *User Account Name (e.g. Jsmith1012)*
 - b. *User Account Email Address*
 - c. *Your Name or Business Name (if applicable)*
 - d. *Trust Account Number(s) requesting to be associated to*
 - e. *Financially Responsible Party on above mentioned Trust Account(s)*
 - f. *Contact Phone Number*

3. Allow 1-2 business days for processing: once access has been granted, you will be notified via email.

Upon email confirmation, the User Account will be eligible to make online deposits to the designated Trust Account(s). A registered User does not need to create multiple User Accounts to be associated to additional Discretionary Project Trust Accounts in the future. Please contact LUEGTrustAccts@sdcounty.ca.gov or refer to the Online Trust Account Frequency Asked Questions document for additional information on how to request association to multiple Trust Accounts. Online deposits are subject to the same terms and conditions as Discretionary Project Trust Accounts submitted at the County's offices.

How to Make Online Deposit Directions:

- 1) Go to <https://publicservices.sdcounty.ca.gov/citizenaccess/> and Log In with your Registered ACA User Account.

The screenshot shows the San Diego County Citizen Access Portal. At the top, there is a navigation bar with the San Diego County logo and the text "SanDiegoCounty.gov". Below the navigation bar, there are links for "Register for an Account" and "Login". A search bar is also present. Below the search bar, there are several tabs: "Home", "APCD", "AWM", "DEH", "DPW", and "PDS". The main content area is titled "Welcome to the County of San Diego's online Citizen Access Portal". Below this title, there is a section titled "This system will enable residents of San Diego County to:" followed by a list of four items: 1. Research public information. 2. Submit an application (some departments require registration and login to submit an application). 3. View and track the status of your application. 4. Make secure online payments. Below this list, there is a note: "Some services will require you to register for an account." Below the note, there is a section titled "What would you like to do today?" followed by the text "To get started, select one of the services listed below:". Below this text, there are two tabs: "General Information" and "APCD". On the right side of the page, there is a "Login" form. The form has a red border and contains the following fields: "User Name or E-mail:" with the text "Jsmith1010" entered, "Password:" with a masked password "*****", and a "Login »" button. Below the login form, there is a checkbox for "Remember me on this computer" and a link for "I've forgotten my password". At the bottom of the login form, there is a link for "New Users: Register for an Account".

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- 2) At the top right of the screen, click on "Account Management." The Account Management screen allows users to manage their personal information, provide information on who to contact for help, and shows which Discretionary Project Trust Accounts the User is associated to.

The screenshot shows the top navigation bar with categories: Your County Government, Community Services, Healthy Kids & Families, Business Resources, Environment, Public Safety, and Jobs. In the top right, 'Account Management' is highlighted with a red box, next to 'Logout', 'Collections (0)', and 'Announcements'. Below the navigation is a search bar and a row of service tabs: Home, APCD, AWM, DEH, DPW, and PDS. The main content area displays a welcome message for Jane Smith and a section titled 'What would you like to do today?' with links for 'General Information' and 'APCD'.

The screenshot shows the 'Manage Your Account' page. It includes a navigation bar with Home, APCD, AWM, DEH, DPW, and PDS tabs. The main content area is titled 'Manage Your Account' and provides instructions on how to update account information. It also includes contact information for help. Below this, there is a section for 'Account Type' (Citizen Account) and two expandable panels: 'Login Information' and 'Contact Information'. The 'Login Information' panel shows: User Name: Jsmith1010, E-mail: any@email.com, Password: *****, and Security Question: What is the brand of your first car?. The 'Contact Information' panel shows: Jane Smith, 123 Main Street, any@email.com, Preferred Method of Contact: E-mail, and Primary Phone: 123-456-7891.

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- 3) Scroll down to the bottom of the page and locate the Trust Account Information section. Select which Trust Account to make an online deposit into by clicking the "Deposit" hyperlink on the corresponding line.

Please note: deposits to Trust Accounts made in error are subject to the same terms and conditions of Discretionary Projects. To avoid delays in getting funds available in your Trust Account, verify the Trust Account ID before proceeding in the deposit process.

Account ID	Balance	Description	Status	Ledger Account	Action
000007-D-TVTEST	\$49,702.64	Major Use	Active	44600 21111	Deposit
12-D-07-0073830	\$2,611.52	PWR120022	Active	44600.21111	Deposit
2021660-D-KLIM1	\$107.00	Family Trust	Active	44600 21111	Deposit

License Information

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 County before you can use it.

- 4) Verify the correct Trust Account was selected for deposit. Select the "Bank Account" Payment Method and complete the required fields (e.g. Amount, Routing Number, Account Number, etc.).

Home APCD AWM DEH DPW PDS

Please select a payment method and then fill in all required information.
The available payment methods are:

- Bank Account

* indicates a required field.

Payment Options

Account ID: 12-D-07-0073830

* Amount:

Pay with Bank Account

Bank Account Information:

* Processing Method: Account Debit

* Account Type: Checking

Provide the following:

* Routing Number: ? * Account Number: ?

DATE: 1335

PAY TO THE ORDER OF \$

NAME:

122220509 1335 0135058228

Routing Number Check Number Account Number

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- 5) Verify payment and billing information are correct before continuing. Once verified, click “Submit Payment” button **once** to make the online deposit and wait for the payment to be processed.

Note: Clicking the “Submit Payment” button more than once may result in multiple withdraws from the User’s bank account.

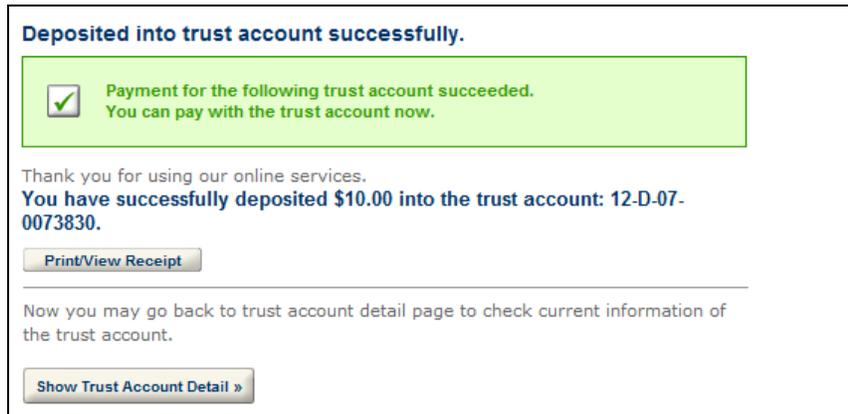
The screenshot shows a web form titled "Account Holder Information:". At the top, there are three input fields for "Routing Number", "Check Number", and "Account Number". Below these is a section for "Account Holder Information:" with a checked checkbox for "Billing Information:". The form includes several required fields marked with an asterisk: "Name" (Jane Smith), "Street Address" (1234 Main Street), "City" (San Diego), "State" (CA), "Zip" (92123), "Phone" (123-456-7891), and "E-mail" (any@email.com). At the bottom left, a "Submit Payment »" button is highlighted with a red box. A red callout box with a pointer to the button contains the text: "Click Only Once (multiple deposits will be made if the Submit Payment button is clicked multiple times)".

After clicking “Submit Payment,” the screen may appear grey and a processing message displayed depending on your resolution settings. Depending on site traffic, the payment processing may take up to a couple minutes. Please be patient.

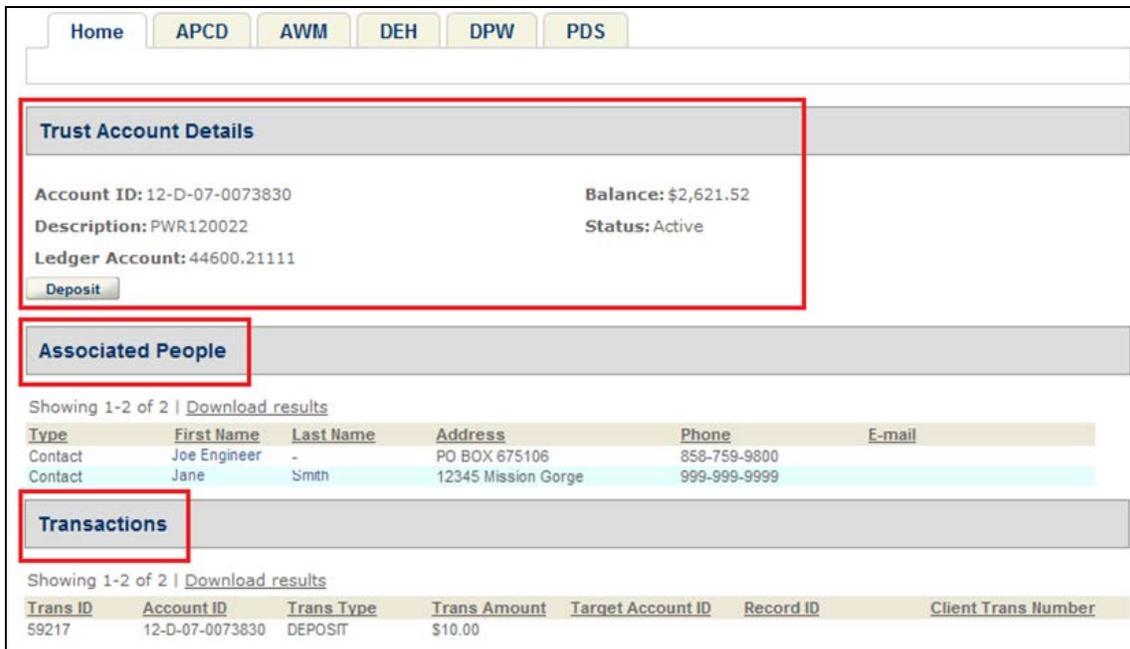
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- 6) Once deposit has been processed, the User will be prompted with a successful completion screen. To print a receipt of the deposit, click on the “Print/View Receipt” button. If a window prompts the User to enter a receipt number, please use the “Show Trust Account Detail” button to locate the receipt number then press back on your navigation window and click “Print/View Receipt” again.

Users can also see detailed information that has occurred on the Trust Account by clicking on the “Show Trust Account Detail” button.

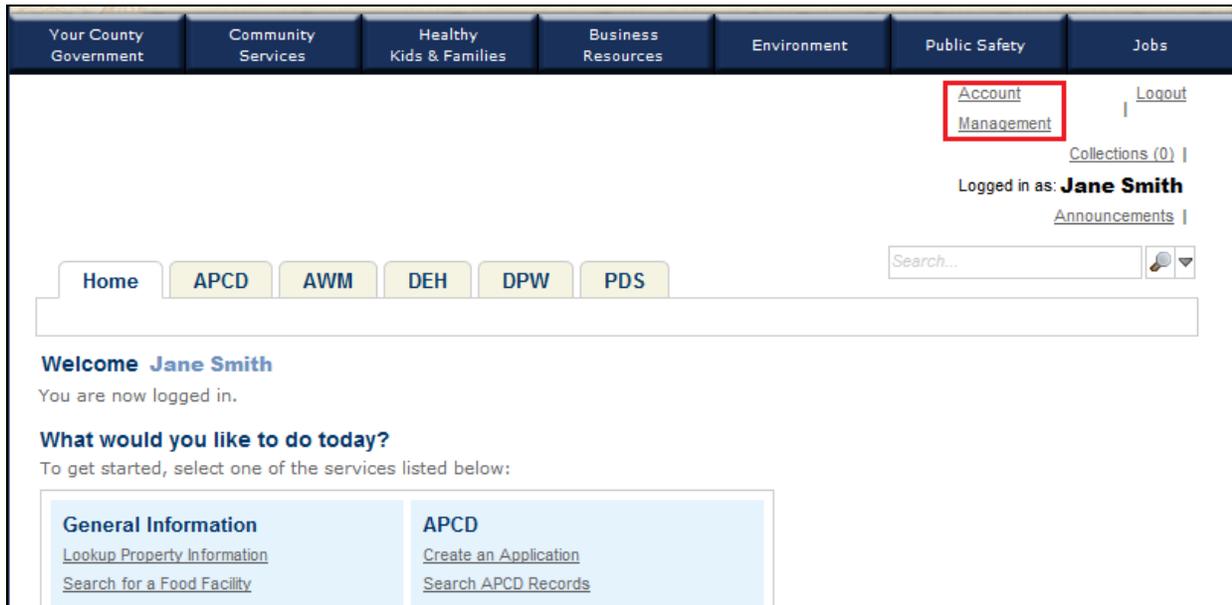


- 7) By clicking the “Show Trust Account Detail” button, the User can make another deposit to the same Trust Account, see who is associated to the Trust Account, see recent transactions that have posted, etc.



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- 8) If a User wishes to make a deposit to a different Trust Account, scroll to the top of the webpage and select "Account Management" link. Repeat the same steps from above for each Trust Account deposit.



Help Contact:

If you have questions regarding your online Trust Account services, please email LUEGTrustAccts@sdcounty.ca.gov for assistance.