

TOPIC: Online Developer Deposits and How to check your Trust Account

On November 26th, 2012 The Land Use and Environment Group of the County of San Diego upgraded to a new permitting system. As a result, the manner in which pre-existing permits (now called Records), project numbers, and online payments are processed have changed to better serve you, our customer.

Trust Accounts, formerly referred to as Developer Deposits or discretionary projects, have changed during this system upgrade. In the previous system, customers had to manage multiple Records with multiple Developer Deposit accounts for a single project. However, in the new permitting system, multiple Developer Deposit accounts have been condensed into a single Trust Account associated to all the permits for the project. This provides the customer a single account to review the activity of their project performed by the various County departments.

Customers can still perform research on their Records and Trust Accounts using the online service. Below are some of the key changes to the Developer Deposit accounts.

- Project Numbers (i.e. Reference Numbers as seen on the monthly statements) have been renamed to remove the individual department prefix (e.g. PLU, PWR, PWW, DEH) to allow for a single Trust Account to follow the life of the project from beginning to end. For instance, a project may have had an account with Department of Public Works and Planning & Development services with numbers of "PWR 10-1234567" and "PLU 10-1234567" respectively. In BCMS, the two project numbers have been condensed to a single account that looks as follows "12-D-10-1234567," (with the '12' representing the year of conversion, the "D" representing the account is a Developer Deposit project, and previous existing project number "10-1234567").

In cases where the customer had projects with the Department of Environmental Health, the project number may include one of the following: Permit Type & Number (e.g. LOWS #####) or DEH Tracking Number (e.g. VS#####).

- The condensed Trust Account is now associated to all related Record(s) and can be seen directly on the Record. There is no longer a separate website for customers to use to check the balance of the Trust Account. Simply look for one of the Records related to your project and the Trust Account can be seen on the Record.
- The Trust Account information displayed online has changed. Now, the Trust Account Description, Trust Account Primary Status, Trust Account Balance, and Trust Account Status are displayed. Registered Financial Responsible Parties will be able to quickly identify all Trust Accounts they, or those designated by the Financial Responsible Party, are associated to via some of the perks of being a registered online user.]

County of San Diego - Land Use & Environment Group

Directions:

- 1) Go to <https://publicservices.sdcounty.ca.gov/citizenaccess/> and click the appropriate department tab (PDS, DPW, APCD, etc.) at the top of the screen or click "Search Applications" under the individual department sections to begin your search. Please note; select the department that your record was opened with during your search. For instance, if your grading record was opened with Department of Public Works (DPW), please use the correct department's tab.

The screenshot displays the County of San Diego online portal. At the top, the County of San Diego logo is on the left, and a search bar with the word "SEARCH" is on the right. Below the logo is a navigation bar with tabs for: Your County Government, Community Services, Healthy Kids & Families, Business Resources, Environment, Public Safety, and Jobs. To the right of the navigation bar are links for "Register for an Account" and "Login". Below the navigation bar is a search bar with the text "Search..." and a magnifying glass icon. A horizontal menu contains tabs for "Home", "APCD", "DEH", "PDS", and "DPW". The "DEH", "PDS", and "DPW" tabs are highlighted with a red border. Below the menu is a "Welcome to the County of San Diego's online Portal" section. It states: "This system enables customers of San Diego County to:" followed by a list: "1. Research information." and "2. View and track the status of your application." Below this is the text: "All services will require account creation." To the right is a "Login" section with fields for "User Name or E-mail:" and "Password:", a "Login »" button, a checkbox for "Remember me on this computer", a link for "I've forgotten my password", and a link for "New Users: Register for an Account". Below the welcome section is a grid of service categories. The "General Information" category includes links for "Lookup Property Information" and "Search for a Licensee". The "APCD" category includes a link for "Search APCD Records". The "PDS" category includes links for "Apply For a New Permit (Residential - Water Heaters, Gas Line Repairs, & Lawn Sprinklers)" and "Search Applications". The "DPW" category includes a link for "Search Applications". The "PDS" and "DPW" category headers are highlighted with a red border.

County of San Diego - Land Use & Environment Group

- 2) Enter in your project's or record's information in one or multiple search criteria to narrow the results. In the example below, the Record ID is used. In the Record ID field enter the Record ID associated to your project. Next, change the Start Date and End Date to a time frame that your project was opened. Hit 'Enter' on your keyboard or click "Search" at the bottom of the screen.

General Search General Search ▾

Search All Records

Record ID: **Record Type:**

Project Name:

Start Date: **End Date:**

License Type: **State License Number:**

First Name: **Last Name:** **Name of Business:**

Street #: **Direction:** **Street Name:** **Street Type:**

Unit Type: **Unit No.:** **Parcel #:**

City: **State:** **Zip:**


▶ [Search Additional Criteria](#)

County of San Diego - Land Use & Environment Group

- 3) Scroll to the bottom of the screen to see the search results. Click on the desired Record ID hyperlink under the Search button. If no results displayed, expand the Start and End Dates and try again. If too many results display, try narrowing the search by entering in additional criteria.

1 Record results matching your search results

Click any of the results below to view more details.

Show on Map 

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

<input type="checkbox"/>	<u>Date</u>	<u>Record ID</u>	<u>Record Type</u>	<u>Project</u>	<u>Address</u>	<u>Record Status</u>
<input type="checkbox"/>	04/05/2004	PDS2004-3100-5231	Tentative Map	PALA MESA	0 NO ADDRESS	Out to Applicant

County of San Diego - Land Use & Environment Group

- 4) The Record ID and the related information on the Record will display on the screen. Scroll to the bottom of the screen and expand the Trust Account Information box by clicking on the arrow.

If the project has an associated Trust Account it can be seen here. Please note that only Trust Accounts marked as 'Primary' will be used to pay for work performed on the project. Other Trust Accounts may display but are not marked as Primary for numerous reasons. For instance, the Trust Account could be a Bond/Guarantee associated to the project which cannot be used to pay for work performed to the project.

The screenshot shows a web interface with navigation tabs for Home, APCD, PDS, and DPW. Below the tabs is a search bar with the text "Apply For a New Permit (Residential - Water Heaters, Gas Line Repairs, & Lawn Sprinklers) | Search Applications". The main content area displays "Record ID PDS2004-3100-5231:" and "Tentative Map". A "Work Location" button is visible. Below this are several expandable sections: "Processing Status", "Related Records", "Valuation Calculator", and "Trust Account Information". The "Trust Account Information" section is expanded, showing a table with one row of data. The table has columns for Description, Primary, Balance, and Status. The data row shows "PLU104990/PWR124179", "Y", "\$1,469.94", and "Active".

Description	Primary	Balance	Status
PLU104990/PWR124179	Y	\$1,469.94	Active

Description: This field displays historical data about the project if opened prior to November 16th, 2012 or contains the name of the Financial Responsible Party if opened after November 16th, 2012. If the Trust Account was opened prior to November 16th, this information represents your former award number(s) associated to the project and or department: these numbers can be seen on old monthly statements. If the Trust Account was opened after November 16th, 2012 the Financial Responsibility Party's name will display (e.g. *ABC Company*).

Primary: This field identifies which Trust Account, if more than one is listed, will be used to pay for work performed on the project. Only Trust Accounts marked with a "Y" can be used to pay for work performed on the project.

Balance: This field represents the balance on the Trust Account(s) listed. However, please note that this may not reflect any unpaid fees associated to the Trust Account. For a more a detailed summary of the Trust Account, use the Trust Account balance report under "Account Management" at the top of the screen. You may need to register in order to run the Trust Account report.

Status: This field represents if the Trust Account is active or closed. However, if the Record itself is closed, the Trust Account will not display; to prevent any additional work performed in error on the record to charge against the Trust Account balance.

More Information:

[N/A]

Help Contact:

If you have questions regarding your Trust Account, please call the Developer Deposit Mailbox at (858) 694-2320, or email PDSDevDep@sdcounty.ca.gov.



Permitting System Help Guides