

Development Services

CONSULTANT REFERENCE

Edmonton

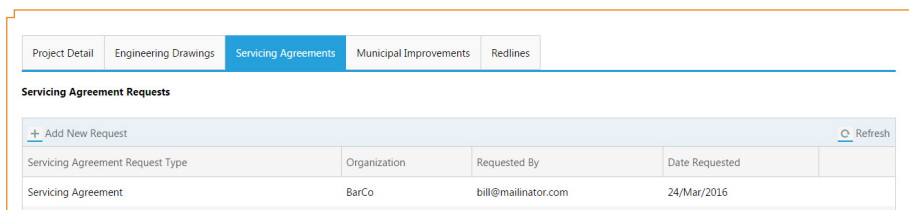
Updated April 2016



Requesting a Servicing Agreement

To request a Servicing Agreement for a project:

1. **Login** to the eServices site (<https://eservices.edmonton.ca>)
2. The **My Projects tab** will show you all the projects to which you have been assigned – **Or** – **Search for the Project** where you want to request a Servicing Agreement.
3. Select the project.
4. When the Project opens – select the **Servicing Agreement tab**.
5. In the Servicing Agreement Requests grid – select the **Add New Request** button



The screenshot shows a web interface with a navigation bar at the top containing tabs: Project Detail, Engineering Drawings, Servicing Agreements (highlighted), Municipal Improvements, and Redlines. Below the navigation bar is a section titled "Servicing Agreement Requests". This section contains a table with a header row and one data row. The header row has columns for "Servicing Agreement Request Type", "Organization", "Requested By", and "Date Requested". The data row shows "Servicing Agreement", "BarCo", "bill@mailinator.com", and "24/Mar/2016". Above the table is a "+ Add New Request" button and a "Refresh" button.

Servicing Agreement Request Type	Organization	Requested By	Date Requested
Servicing Agreement	BarCo	bill@mailinator.com	24/Mar/2016

6. Select the **Servicing Agreement type** from the dropdown list.
7. Select the **checkmark button** to save the Servicing Agreement request.

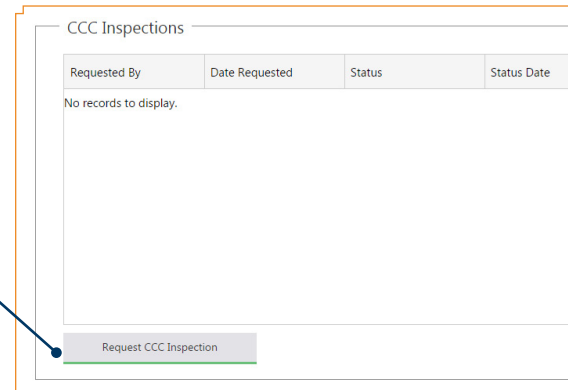
Your request will be forwarded to the Development Coordination staff assigned to the project.

Inspection Request

The Inspection Request is in two parts, the Inspection Request and the Signing of the Inspection Disclaimer.

When construction of the Municipal Improvement has been substantially completed, a consultant can request an inspection for the municipal improvement.

1. **Login** to the eServices system. (<https://eservices.edmonton.ca>)
2. **Search \ Open** the Project that has the Municipal Improvement.
3. Select the **Municipal Improvements tab**.
4. **Select the Municipal Improvement** from the list.
5. Select the **Request CCC \ (FAC) button** in the CCC \ (FAC) Inspections box
6. The Inspection Request form will be opened



The screenshot shows the "Inspection Request" form. The form fields are as follows:

- Project: Hollow Hills - Stage 5
- Municipal Improvement: Water Main Abandonment
- Responsible Department: EPCOR Water
- Date Submitted: [Empty]
- Requested By: [Empty]
- Inspection Type: CCC Inspection
- Status: [Empty]
- Expiry Date: [Calendar icon] [Extend Expiry Date] [Expire Now]

At the bottom of the form, there are three tabs: "Inspection Request" (selected), "Inspection Disclaimer", and "Inspection Result". Below the tabs, there are fields for "Contractor:" and "Authorized Signatory:". At the bottom right, there are two buttons: "Cancel / Close" and "Save Inspection Request".

7. **Complete the Inspection Request** by filling in the information requested:
 - a. **Contractor** – enter the name of the Contractor.
 - b. **Authorized Signatory** – from the drop down list, select the person who can sign the Inspection Disclaimer.
8. Select the **Save Inspection Request** button.

The system will notify the person identified as the Authorized Signatory to sign the disclaimer. A task will be created and placed on their My Tasks list.

Signing an Inspection Disclaimer

As part of the creation of an Inspection Request, a user is identified as the person who will sign the Inspection Disclaimer. When the Inspection Request is saved, a task will be placed on the My Tasks list of the person identified on the Inspection Request.

To sign the Inspection Disclaimer:

1. **Login** to the eServices system. (<https://eservices.edmonton.ca>)
2. Select the **My Tasks** button
3. Find the task and select **Open**
4. The Inspection Disclaimer Tab will be shown

The screenshot shows a web application window titled "Inspection Request". The form contains the following fields and controls:

- Project: Hollow Hills - Stage 6
- Municipal Improvement: Arterial Roadway Surface Improvements
- Responsible Department: Transportation Services
- Date Submitted: (empty)
- Requested By: Bill Kelly
- Inspection Type: CCC Inspection
- Status: Assigned
- Expiry Date: (empty) with buttons for "Extend Expiry Date" and "Expire Now".

Below these fields is a tabbed interface with three tabs: "Inspection Request", "Inspection Disclaimer" (which is selected and highlighted in blue), and "Inspection Result".

Under the "Inspection Disclaimer" tab, the "Disclaimer Status" is "Not Signed". Below this is a "Disclaimer:" section with a checkbox labeled "Please check this box and save Inspection Request." which is currently unchecked.

The disclaimer text reads: "I, **Bill Kelly** OF THE FIRM **Barco** ("CONSULTING ENGINEERS") HEREBY CERTIFY THAT THE MUNICIPAL IMPROVEMENT WORK NOTED HEREIN MEETS ALL REQUIREMENTS FOR A CONSTRUCTION COMPLETION CERTIFICATE AS SPECIFIED IN THE SAID SERVICING AGREEMENT MENTIONED ABOVE AND CONSTRUCTED AS FAR AS CAN BE PRACTICALLY ASCERTAINED ACCORDING TO THE CITY OF EDMONTON DESIGN AND CONSTRUCTION STANDARDS IN COMPLIANCE WITH THE REQUIREMENTS OF THE SAID SERVICING AGREEMENT. I, HEREBY, RECOMMEND THIS MUNICIPAL IMPROVEMENT FOR APPROVAL OF THE CONSTRUCTION COMPLETION CERTIFICATE BY THE CITY OF EDMONTON."

At the bottom of the form are two buttons: "Cancel / Close" and "Submit Inspection Request".

5. **Check the Disclaimer box**
6. Select the **Submit Inspection Request** button

A notification will be sent to the Review Team that is responsible for the municipal improvement, informing them of an Inspection Request.

Adding an Organization Contact to the Sign Disclaimer List

An Inspection Disclaimer can be signed by those contacts who have been identified as being able to sign the disclaimer.

The contact must be identified in the eServices system to show up on the list when the Authorized Signatory is added to the inspection request.

You must be an OrgAdmin to control your organization details/users. Contact development.coordination@edmonton.ca to get OrgAdmin permissions set on your account.

1. **Login** to the eServices system. (<https://eservices.edmonton.ca>)
2. Select the **Development Coordination** menu item
3. Select the **Organizational Details** menu item
4. Select the **Organization Contacts** tab

+ Add new Organization contact Refresh										
	First Name	Last Name	Position	Phone	Fax	Cell Phone	Email	Portal User Name	Role	Source Organization
	Bill	Kelly	Commercial Desig	(635) 465-4654	() - - -	() - - -	bill@mailinator.cc	bill@mailinator.cc	DCConsultant	BarCo
	George	Kelly	Commercial Deve	(968) 352-1564	() - - -	() - - -	george@mailinat	george@mailinat	DCDeveloper	BarCo

5. Select the **Edit** button for the person you wish to edit.
6. When the edit opens – check off the **Disclaimer check box** (last field on the contact record)

Fax: () - - -

Cell Phone: () - - -

Email: george@mailinator.com

Role: DCDeveloper

Disclaimer:

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7. **Update** the contact record.