



Urban Development Online **Special Clauses Tab** Reference Guide

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Revision 2.1

Revision History

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1.1	Added content	2013-02-04	Carolyn Anscombe
1.2	Review and Complete Documentation	2013-02-08	Carolyn Anscombe Deb Meili Brent Kromm Michael Ficaccio
1.3	Cost Sharing Clause Tool	2018-07-20	Debbie Meili Brian Willson
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Purpose of the Manual

This Urban Development Online (UDO) Quick Reference Guide is to be used by Developers and/or their Consulting Engineers and will document the steps to complete the actions on the **Special Clauses Tab** of the Urban Development Online Development Application.

NOTE:

The building of this training material required the use of existing Subdivision Application and Construction Drawing information provided to the City of Calgary. You may notice slight inconsistencies throughout the training material. The information used is for demonstration purposes only. These variances are not to deter from the intended content.

Special Clauses Tab Overview

Section	Available Actions
Outstanding Special Clause Issues	<ul style="list-style-type: none">• View Outstanding Special Clause Issues.
Special Clauses	<ul style="list-style-type: none">• View the Special Clauses Library.• View and edit generated Special Clause details.• Add Special Clauses and Additional Repayments.
Special Clause Amounts Totals	<ul style="list-style-type: none">• View amounts totaled from the Special Clauses list.
Complete Updates	<ul style="list-style-type: none">• Save or Cancel changes.

Agreement Request Requirements

Click on the **Agreement Request Requirements** link to be directed to the [Urban Development Online \(UDO\) services \(calgary.ca\)](#) website.

URBAN DEVELOPMENT ONLINE

New Requests

Search

Securities

Find Requests By JAC

Sign Out

Development Agreement Request

Agreement Request Requirements

Number of Records:

Status

Outstanding Special Clause Issues

When there are no **Outstanding Special Clause Issues** the Urban Development Online System will indicate this by showing that there are **(None)**.

Outstanding Special Clause Issues

If there are any outstanding Special Clause issues listed below, they must be resolved prior to submission.

[None]

Special Clauses

To view the current Special Clause library, click on the **Special Clause Library** link.

NOTE: The **Special Clause Library** can remain open while working on the application.

Special Clauses

- Please click Generate Special Clauses button to [Generate clauses for this agreement](#).
 - Click here to view the current [Special Clause Library](#)
 - Click the Add Special Clause button to add a special clause record.
 - Click the Details link on existing special clause records to review and edit the clause text.

Generate Special Clauses

Click the **Generate Special Clauses** button to have the Urban Development Online System generate the limited Special Clauses based on the information provided while building the application. This is especially applicable to Infrastructure Obligations that have a Deposit / Repayment component as a clause is required to further describe the details for these.

Special Clauses

- Please click Generate Special Clauses button to [Generate clauses for this agreement](#).
 - Click here to view the current [Special Clause Library](#)
 - Click the Add Special Clause button to add a special clause record.
 - Click the Details link on existing special clause records to review and edit the clause text.

If a **Special Clause** is incomplete and requires additional information, it will have a **Delta Symbol** beside it. Click on **Details** for the Special Clause with the **Delta Symbol** to complete the required fields for the special clause.

 [Details](#) Off-Site Levies, Fees and Charges Surrounding Roads

Generate Special Clauses update section

A window showing **Special Clause** details will open.

Task	Steps
View Outstanding Special Clause Issues	Resolve any Outstanding Special Clause Issues . <hr/> Outstanding Special Clause Issues If there are any outstanding Special Clause issues listed below, they must be resolved prior to submission. <ul style="list-style-type: none"> All outstanding Special Clause Mandatory issues must be resolved.
Build Special Clause Text	Add the Clause Category and Clause Type if not already added. <ol style="list-style-type: none"> If a Clause Category and Clause Type have not already been selected, select them from the dropdown lists. If you cannot find the correct Clause Category or Clause Type, you may select 'Other' and continue to step 2. <p>*Clause Category: <input type="text" value="Off-Site Levies, Fees and Charges"/></p> <p>*Clause Type: <input type="text" value="Surrounding Roads"/></p> Click the Preview button at any time to Preview the complete Special Clause text.

2 Click the Preview button at anytime to preview the complete Special Clause Text.
 a. Note that the clause preview contains {placeholders} corresponding to the field labels below.
 b. For each placeholder, enter a value in the corresponding field below.
 c. Click the Preview button to update clause placeholders and save the completed clause in the database.

PREVIEW

The Off-site Levies, Fees and Charges payment, as required under Clauses 3.01 to 3.07 of the Terms and Conditions include an additional area of {Area Measurement} hectares as the Developer is required to pay the Off-site Levies, Fees and Charges on an 10.06 metre width of 52 Street NE along the east boundary of the Development Area.

Update Special Clause details

Fill in all required fields highlighted in red text. Example:

3 To insert values into the special clause template, enter those values in the fields below.

Agreement Date:		Height Measurement:	Metres
Agreement Name:		Lane Type:	(select type)
Amount:	\$	Legal Description:	
*Area Measurement:	<input type="text"/>	Length Measurement:	Metres
*Boundary Direction A:	<input type="text" value="east boundary"/>	Percentage:	
Boundary Direction B:	(select direction)	Road Type:	(select type)
Carriageway A:	Lane (eg. 2 of the 4)	Roadway Lanes:	
Carriageway B:	Lane (eg. 4 of the 4)	Roadway Startpoint:	
Community/District:		*Roadway/Location:	<input type="text" value="52 Street NE"/>
Consultant:		Schedule B Colour:	
Contract Number:	<input type="text"/>	Schedule B Points:	
Developer:		Traffic Direction A:	(select direction)
Developer Of Record:	SADDLE RIDGE CROSSING INC.	Traffic Direction B:	(select direction)
Developer Tier:	Tier D	Walkway Type:	(select type)
Development Phase:		Watershed Name:	(select watershed)
Extension Direction:	(select direction)	*Width Measurement:	<input type="text" value="10.060"/> Metres
Fence Type:	(select type)	Number of Lots:	<input type="text"/>

Add Cost Sharing Agreement

Enter **Request Number** in the **Cost Share Lookup**. Click **Search**.

Cost Share Lookup

Request Number:

When the Request Number checkbox is selected the **Display Format** text will be added to the **Build Special Clause Text**. Click **SAVE** to have UDO populate various clause fields using data from this job that has been selected.

Select	Request Number	Display Format
<input type="checkbox"/>	DA	

Attach Supporting Documentation

Add any required comments to account for or document the **Special Clause**.

4 Add any comments required to account for or document this special clause record.

Attach supporting documentation using the **Attach File** button.

3 To attach adjustment supporting documentation, click the Attach File button.

ATTACH FILE

File Name	Description
-----------	-------------

Click **Upload** to attach the file. Acceptable file extensions are pdf, dwg, doc, docx, xls, xlsx, jpg, jpeg, msg and text.

	<h3>Document Upload</h3> <p>Fill in filename (including path) and then click [Upload] to send.</p> <p>Remember that uploads are only accepted for files with extensions of: .doc, .docx, .dwg, .jpeg, .jpg, .msg, .pcz, .pdf, .tiff, .txt, .xls or .xlsx</p> <p>*File Name: <input type="text" value="Choose File"/> No file chosen <input type="button" value="Upload"/></p> <p><i>* An asterisk indicates a required field.</i></p>
<p>Save Updates to Special Clauses Section</p>	<p>The Save and Close button will update the Category item in the Special Clauses section.</p> <p><i>To update your changes on the parent screen, please use the "Save and Close" button.</i></p> <p><input type="button" value="SAVE"/> <input type="button" value="SAVE AND CLOSE"/> <input type="button" value="CANCEL"/></p> <p>Note: Grey Shaded box indicates that there are comments, and or an attachment included in the Details link.</p>

Add Special Clause update section

Click the button for any additional Special Clauses not generated by the Urban Development Online Application.

Special Clauses

- Please click Generate Special Clauses button to Generate clauses for this agreement.
 - Click here to view the current [Special Clause Library](#).
 - Click the Add Special Clause button to add a special clause record.
 - Click the Details link on existing special clause records to review and edit the clause text.

A window showing **Special Clause** details will open. Complete all sections as in the [Generate Special Clauses update section](#).

Additional Repayments section

Click the button for **Additional Repayments** that are not generated by the Urban Development Online Application.

- Record additional Repayments for Special Projects funded by The City of Calgary
 - To include these Special Projects, click the Additional Repayments button
 - To add comments or attach documents to the following click the details link

ADDITIONAL REPAYMENTS				
Description	Type	HA or Metre	Rate	Cost
TOTAL ADDITIONAL REPAYMENTS				

Additional Repayments update section

A window showing **Additional Repayments** details will open.

SAVE
SAVE AND CLOSE
CANCEL

Additional REPAYMENTS Details

1 Select the Special Project that is applicable to your phase of Development.
Fill in the required fields

Name:

Exempt:

Hectares/Lineal: None

Rate:

Estimated Cost:

2 Add any comments required to account for or document this additional record.

3 To attach supporting documentation for this, click the Attach File button.
Please note that the maximum acceptable file size is 10 MB.

ATTACH FILE

File Name	Description

To update your changes on the parent screen, please use the "Save and Close" button.

SAVE
SAVE AND CLOSE
CANCEL

Task	Steps				
Update Additional Repayments Details	Enter the Additional Repayment Details for the appropriate Special Project in the dropdown list. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="background-color: #f2f2f2; padding: 2px; border: 1px solid #ccc; margin-bottom: 5px;"> Additional REPAYMENTS Details </div> <p>1 Select the Special Project that is applicable to your phase of Development. Fill in the required fields</p> <p>Name: <input type="text" value="(select additional repayment)"/></p> <p>Exempt: <input type="checkbox"/></p> <p>Hectares/Lineal: <input type="text"/> None</p> <p>Rate:</p> <p>Estimated Cost:</p> </div>				
Add Comments	Add a comment (required) to explain why the repayments were added. <p>2 Add any comments required to account for or document this additional record.</p> <div style="border: 1px solid #ccc; height: 40px; margin-top: 10px;"></div>				
Attach Documents	Add an attachment (optional) to add supporting documentation if applicable. <p>3 To attach adjustment supporting documentation, click the Attach File button.</p> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 10px;">ATTACH FILE</div> <table style="border-collapse: collapse;"> <thead> <tr> <th style="border: none; padding: 5px 10px;">File Name</th> <th style="border: none; padding: 5px 10px;">Description</th> </tr> </thead> <tbody> <tr> <td style="border: none; height: 20px;"></td> <td style="border: none;"></td> </tr> </tbody> </table> </div> <p>Click Upload to attach the file. Acceptable file extensions are pdf, dwg, doc, docx, xls, xlsx, jpg, jpeg, msg and text.</p>	File Name	Description		
File Name	Description				

**Save Updates
Additional
Repayments
Section**

The **Save and Close** button will update the **Description** item in the **Additional Repayments** section.

To update your changes on the parent screen, please use the "Save and Close" button.

SAVE

SAVE AND CLOSE

CANCEL

Special Clause Amount Totals

View the **Special Clause Amount Totals** from the special clauses listed in section 1 on the **Special Clauses Tab** page.

Special Clause Amount Totals

3 Review the following amounts totaled from the special clauses listed above.

Total Deposits: \$0.00

Total Repayments:

Complete Updates

When you have completed the **Details Tab** page click **Save**. Save buttons are at the top and bottom of the tab sections.

Top

SAVE

CANCEL

Details

Infrastructure

Areas

Assessments

Special Clauses

CCC-FAC

Financial

Attachments

Submit

Bottom

* An asterisk indicates a required field.

SAVE

CANCEL