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# MyCLSS Web site overview

Release 2.0 – September 2015



Canada 

# Home page

MyCLSS

[Version française]

Help Log In

Research ▾

Authorizations ▾

Data and Tools ▾

Plan check ▾

Recording ▾

News ▾

## MyCLSS is...

a collaborative site between the Association of Canada Lands Surveyors (ACLS), the Surveyor General Branch (SGB) and the Land Adminstrating Agencies to allow surveyors to:

- initiate a survey project
- request survey instructions
- use online tools to help the surveyor in the production of official plans
- monitor project status until completion
- submit digitally signed survey documents for recording
- obtain approvals
- monitor project status until completion

MyCLSS provides surveyors quick reference to relevant survey information to assist them through the survey process. Surveyors should contact the ACLS to obtain access information.

MyCLSS also provides an electronic tool for land administrators to carry out the approval process of survey plans. Administrators should contact the SGB to obtain access information.

[Contact ACLS](#) [Contact SGB](#) [Terms of Use](#) [Privacy policy](#)



# Home Page

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- The Home Page is open to all
- The green bar has a lot of information that is useful to CLSs to proceed with their projects and is placed in the normal sequence of events from left to right
- The News menu is a new feature that provides current and archived news
- See next slide for examples

# Green Bar

MyCLSS

[Version française]

Help Log In

Research

Authorizations ▾

Data and Tools ▾

Plan check ▾

Recording ▾

News ▾

Survey Plan Search

Survey Project Search

Map Browser

► Land Titles Offices

Yukon Lands

Indian Land Registry

► Standards

Canada Lands in Google Earth

Legislation - Justice Canada

Legislation - CanLII

Parks Canada

the Association of Canada Lands Surveyors (ACLS), the Surveyor  
the Land Administrating Agencies to allow surveyors to:

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ne surveyor in the production of official plans  
til completion  
urvey documents for recording

til completion

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ould contact the [ACLS](#) to obtain access information.

electronic tool for land administrators to carry out the approval process of  
ould contact the SGB to obtain access information.

## New release MyCLSS 2

July 1st, 2015

Welcome to the new release of MyCLSS2, new interface and features based on your feedback. Please review the user manual and online tutorials to guide you through the new features.



# Home Page

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- At top right of Home Page, you have access to a **Help** button and **Log In** to enter into your private section of the system
- There is also a button to change the language to French
- At bottom of page, you can send a message to the ACLS if you are having issues with the Checklist sections or to SGB if you have issues with the project management section (MyCLSS)

# Home Page

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[Version française]

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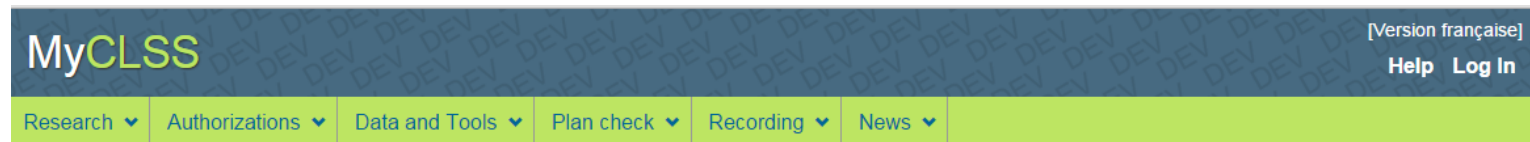
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[Contact ACLS](#) [Contact SGB](#) [Terms of Use](#) [Privacy policy](#)

# Login

When you click on **Log In**, you will see the page below:

- The left side is used by Project Surveyors and the right side is used by Land Administrators for electronic approval (eApproval) of plans.



The screenshot shows the header of the MyCLSS website. It features a dark blue background with the text 'MyCLSS' in white and green. To the right, there is a link for '[Version française]'. Below the header, there is a green navigation bar with several menu items: 'Research', 'Authorizations', 'Data and Tools', 'Plan check', 'Recording', and 'News', each followed by a dropdown arrow. To the right of these items are links for 'Help' and 'Log In'.

## Log in

### Surveyor's Log in

Please provide username/password to log in

\* Username

\* Password

Sign in

[Forgot Your Password?](#)

### Land Administrator/Registrar Log in

Please provide username/password to log in

\* Email

\* Password

Sign in

[Forgot Your Password?](#)



## Log In

---

- The ACLS provided a user name and password to access your own section of the system
- You can change your password at any time by going to **My Profile**
- After logging in, you will see the **My Projects** screen shown on following slide



# My Projects

**MyCLSS**

[Version française]

Welcome Support SGB2 Ottawa

My Projects My Profile Help Log Out

Research ▾ Authorizations ▾ Data and Tools ▾ Plan check ▾ Recording ▾ News ▾

Search

[Home](#) → [My Projects](#) → My Projects

## My Projects

+ New survey project




Archived projects +

1

2

3

Next →

Project Number	Status	Survey Project Description	Canada Lands	Survey Instructions
<a href="#">MyFile-001</a> SGB number: 201420007	Amendments Requested	Testing stage of Dev CLS Act Survey of Commissioners Land - GN administration	ARCTIC BAY	
<a href="#">LTA plan Nunavut</a> SGB number: 201420006	Instructions Issued	Test this process Land Titles Act - Compiled	IQALUIT (FROBISHER BAY)	
<a href="#">CLS Act Nunavut</a> SGB number: 201420005	Instructions Issued	TEST ING PROCESS CLS Act Survey of Commissioners Land - GN administration	IQALUIT (FROBISHER BAY)	



# My Projects

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- On this page, you can:
  - Create a new project
  - Manage your existing project
  - Access closed projects (archived projects)
- At anytime, when you click on **My Projects** at top right of the page, the system brings you to the **My Projects** page
- Same if you click on **My Profile** at top right, you access your profile page (see next slide)

# My Profile

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MyCLSS

[Version française]

Welcome Support SGB2 Ottawa  
[My Projects](#) [My Profile](#) [Help](#) [Log Out](#)

[Research](#) ▼

[Authorizations](#) ▼

[Data and Tools](#) ▼

[Plan check](#) ▼

[Recording](#) ▼

[News](#) ▼

## My Profile

Use this page to change your address/contact information or to change your password. This information is used by the SGB for correspondence concerning your projects and by the ACLS to update its membership database. For other changes or questions about your profile, please contact the ACLS using this e-mail: [admin@acis-aatc.ca](mailto:admin@acis-aatc.ca)

[VIEW / UPDATE PROFILE](#) ➔

[CHANGE PASSWORD](#) ➔



# My Profile

---

- This is where you can change your password and make changes to your e-mail address, phone number, and so on
- The next two slides show how to change your contact information and your password
- This information is used to update the ACLS membership database and for SGB to know where to send Survey Instructions
- The first time you log in, you should change your password and check your contact information

# Password

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A screenshot of a 'Change password' dialog box. The dialog has a title bar with the text 'Change password' in blue and a close button 'x' in the top right corner. Below the title bar, the name 'Jean-Claude Tetreault' is displayed in bold. There are three input fields, each preceded by a label and a red asterisk: 'CURRENT PASSWORD:', 'NEW PASSWORD:', and 'CONFIRM PASSWORD:'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

**Change password** x

**Jean-Claude Tetreault**

CURRENT PASSWORD: \*

NEW PASSWORD: \*

CONFIRM PASSWORD: \*

OK Cancel

# My Profile

---

## View / Update Profile

[x](#)

### Jean-Claude Tetreault

STREET: \* 900 Dynes Road, Suite 100E

CITY: \* Ottawa

PROVINCE: \* ON ▼

POSTAL CODE: \* K2C 3L6

OFFICE PHONE: (613) 723-9200

HOME PHONE: 613-555-5555

MOBILE PHONE:

FAX:

EMAIL: \* jctetreault@acis-aatc.ca

LANGUAGE: Fra ▼

Update

Cancel

# Create a project

Click on **New survey project**:

MyCLSS

[Version française]  
Welcome Support SGB2 Ottawa  
My Projects My Profile Help Log Out




Research ▾ Authorizations ▾ Data and Tools ▾ Plan check ▾ Recording ▾ News ▾  Search

[Home](#) → [My Projects](#) → My Projects

## My Projects

+ New survey project Archived projects ➕

1 2 3 Next ➡

Project Number	Status	Survey Project Description	Canada Lands	Survey Instructions
<a href="#">MyFile-001</a> SGB number: 201420007	Amendments Requested	Testing stage of Dev CLS Act Survey of Commissioners Land - GN administration	ARCTIC BAY	
<a href="#">LTA plan Nunavut</a> SGB number: 201420006	Instructions Issued	Test this process Land Titles Act - Compiled	IQALUIT (FROBISHER BAY)	
<a href="#">CLS Act Nunavut</a> SGB number: 201420005	Instructions Issued	TEST ING PROCESS CLS Act Survey of Commissioners Land - GN administration	IQALUIT (FROBISHER BAY)	

# Create a project

First step is to supply project information and request survey instructions (notice the change of interface from MyCLSS version 1)

## New Project

PROJECT INFORMATION		SURVEY DOCUMENTS	
<b>1 SURVEY INFORMATION</b>		<b>2 SUPPORT DOCUMENTS</b>	
		<b>3 REQUEST INSTRUCTIONS</b>	

* Surveyor's project number	<input type="text" value="User-File-01"/>
* Survey project description	<input type="text" value="Test project"/>
Permit holder	<input type="text" value="N/A"/>
* Region of survey	<input type="text" value="ONTARIO"/>
* Location of survey	<input type="text" value="AKWESASNE RESERVE"/>
* Type of survey	<div><div><input type="radio"/> Air Space Survey</div><div><input type="radio"/> Building Unit Survey</div><div><input type="radio"/> Compiled Plan</div><div><input type="radio"/> Explanatory Plan</div><div><input type="radio"/> Field Notes of Reestablishment and/or Restoration of Monuments (LS56)</div><div><input type="radio"/> Field Notes of Survey - Only</div><div><input type="radio"/> First Nation Land Management (FNLN) Land Description</div><div><input type="radio"/> Highway / Railway and Similar Right-of-Way Survey</div><div><input type="radio"/> Jurisdictional Boundary Survey</div><div><input checked="" type="radio"/> Parcel Survey</div></div>

\* Denotes Required Field

Next





# Request Survey Instructions

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- The previous slide shows a 3-step process: Survey Information, Support Documents and Request Instructions
- On this page, you enter the information needed by SGB staff in order to issue instructions
- The current process is enabled while the others are disabled
- The next process is enabled as you click on the Next button successively



# Request Survey Instructions

---

- The first three lines of information are identifying details that you want to assign to the project.
- Surveyor's Project Number allows you to specify your preferred reference name. It is used in addition to the SGB generated project number. It will be shown on My Projects page and you can search your projects by this reference.
- For **Survey Project Description**, provide a name that allows you to easily find this project in a list of all your projects. A name that is meaningful to you. This will carry over through the whole system.
- The Permit Holder field should show the name of your firm (if applicable).
- The following lines provide more information on your project.

# Request Survey Instructions

## ○ Survey Information

PROJECT INFORMATION		SURVEY DOCUMENTS	
1 SURVEY INFORMATION ○		2 SUPPORT DOCUMENTS ○	
		3 REQUEST INSTRUCTIONS ○	
* Surveyor's project number	<input type="text"/>		
* Survey project description	<input type="text"/>		
Permit holder	<input type="text" value="N/A"/>		
* Region of survey	<input type="text" value="Please Select"/>		
* Location of survey ⓘ	<input type="text"/>		
Search starts after first 2 characters typed. Type dash (-) instead of degree (°). E.g.: to search "GRID AREA 60°20'N", please type "GRID AREA 60-20'N" or simply "60-20'N"			
* Type of survey	<input type="radio"/> Please select Region & Location of Survey first		
* Denotes Required Field			
<input type="button" value="Next"/>			



# Request Survey Instructions

---

- The next slide shows how you select a region which is a province or a territory
- All you have to do is select from a drop down menu
- A contact name will appear for your local CLU office and phone number (see three slides from this)

# Request Survey Instructions

---

REGION OF SURVEY \*

PROJECT CONTACT INFORMATION \*

LOCATION OF SURVEY

TYPE OF SURVEY \*

--- Please Select ---

--- Please Select ---

- ALBERTA
- BRITISH COLUMBIA
- MANITOBA
- NEW BRUNSWICK
- NEWFOUNDLAND & LABRADOR
- NOVA SCOTIA
- NORTHWEST TERRITORIES
- NUNAVUT
- ONTARIO
- PRINCE EDWARD ISLAND
- QUEBEC
- SASKATCHEWAN
- YUKON

Search starts after first 2 characters typed. E.g.: "quad no. 025", "grid area 60"



# Request Survey Instructions

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- Once region is selected you select the Canada Lands you will survey in by typing any two letters and a selection will appear in the drop down menu
- Just select the specific Canada Lands
- A minimized list of types of surveys will appear. Just make selection and click « **Next** ».

# Request Survey Instructions

\* Region of survey

ONTARIO



\* Location of survey

ak



\* Type of survey

\* Denotes Required Field

12 MILE LAKE DAM  
AKWESASNE RESERVE NO. 59  
BAMAJI LAKE  
BEARSKIN LAKE INDIAN RESERVE  
BIG BEAR LAKE DAM  
BIG BOB LAKE DAM  
CAT LAKE INDIAN RESERVE NO. 63C  
CHAPLEAU CREE FOX LAKE INDIAN RESERVE  
CONSTANCE LAKE INDIAN RESERVE NO. 92  
CONTAU LAKE DAM

\* Location of survey

AKWESASNE RESERVE

\* Type of survey

- ☐ Air Space Survey
- ☐ Building Unit Survey
- ☐ Compiled Plan
- ☐ Explanatory Plan
- ☐ Field Notes of Reestablishment and/or Restoration of Monuments (LS56)
- ☐ Field Notes of Survey - Only
- ☐ First Nation Land Management (FNLM) Land Description
- ☐ Highway / Railway and Similar Right-of-Way Survey
- ☐ Jurisdictional Boundary Survey
- ☒ Parcel Survey

\* Denotes Required Field

Next

# Request Survey Instructions

## Support Documents:

Project: User-File-01 (SGB #201514008)

PROJECT INFORMATION		SURVEY DOCUMENTS
<a href="#">1 SURVEY INFORMATION</a>	<a href="#">2 SUPPORT DOCUMENTS</a>	<a href="#">3 REQUEST INSTRUCTIONS</a>

\* File

 Browse...

Max. 25.00MB - of type: pdf

\* File contains

If all documents are contained in the same PDF, you only need to upload the document once and check the boxes to indicate what the document contains.

- ☐ Approval documents received
- ☐ Survey sketch
- ☐ Additional comments
- ☐ Information regarding Status of Land

### Documentation required:

- Approval documents received
- Survey sketch

\* Denotes Required Field

Clear

Upload

Previous





# Request Survey Instructions

---

To complete your request for instructions you have to provide the required support documents which typically include (depends on location and type of survey) :

- Approval document(s)
- Survey sketch
- Land Status and
- Additional comments

This window allows you to upload these documents to be accessed by SGB staff.

When you completed the input for Survey Information and clicked Next, a project number was assigned by SGB and you were free to end your web session and come back at a later date to carry on.

# Request Survey Instructions

---

To upload the required documents:

- Find PDF copy of documents one at the time by clicking on **Browse**, and locating in your computer
- Click on one or more of the 4 types of documents (multiple items could be contained in one document)
- Click on **Upload** after each document
- As you upload documents, you will see list of required documents over the upload field will diminish
- Once done the **Request Instructions** button is enabled
- If you make a mistake by uploading wrong document you can delete said document by clicking on the **Remove** button on the right of document name under Project Documents, and you can upload a new document.

# Request Survey Instructions

Click on **Request Survey Instructions**

Project: User-File-01 (SGB #201514008)

PROJECT INFORMATION		SURVEY DOCUMENTS
1 <a href="#">SURVEY INFORMATION</a>	2 <a href="#">SUPPORT DOCUMENTS</a>	3 <a href="#">REQUEST INSTRUCTIONS</a>

## Ready to request instructions

All necessary information has been provided.  
You may now send your request for survey instructions.  
To add more documents click the "Previous" button.

[Previous](#)

[Request survey instructions](#)



## Request Survey Instructions

---

- You will notice that a project number has already been issue by SGB (top left in previous slide 201014099)
- The request is sent to SGB who will respond in a few days by e-mail
- At any time during this process you can stop and save your project (the **Next** saves the project up to that point) before finalizing your request for survey instructions



# Request Survey Instructions

---

- This screen appears after submitting your request

[Home](#) [My Projects](#) Survey Project

**Project: User-File-01 (SGB #201514008)**

PROJECT INFORMATION

SURVEY DOCUMENTS

## **Request for survey instructions complete**

Thank you for your request for survey instructions.

The Surveyor General Branch will now begin to prepare your survey instructions. The "Survey Documents" section will be unlocked when the instructions are issued. You will receive an email notification when they are ready to download from MyCLSS.ca.



# Request Survey Instructions

---

- At this point, you are done for this project until you receive the instructions
- At any point in the system, when you click on **My Projects** it brings you to this page and at any time you click on the project number, it brings you to project details page

# Project Information after S.I. Request

Top of page:

## PROJECT INFORMATION

## SURVEY DOCUMENTS

✔ Thank you for your request for survey instructions. An email notice will be sent to you once the survey instructions are prepared.

### ▼ Survey Information

Status	Instructions Requested
Survey Project Description	Plan of survey of lot division
Client Reference Number	mlb 2015-01
Permit holder	N/A
Region of survey	ONTARIO
Location of survey	SIX NATIONS INDIAN RESERVE NO. 40
Type of survey	Parcel Survey
SGB Contact	Kliaman, Cindy 606 - 55 St. Clair Avenue East Toronto, ON M4T 1M2 (416) 973-1006 cindy.kliaman@nrcan-mncan.gc.ca



# Request Survey Instructions

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- Next slide shows bottom half of previous page
  - A link to National Standards for the Survey of Canada Landas (you can click to access)
  - Endorsement blocks will come later when you create a survey document for your project
  - Name of files that you uploaded



# Project Information after S.I. Request

## ○ Bottom of page:


### ▼ Reference and support documents

[National Standards for the Survey of Canada Lands](#)

### ▼ Endorsement Blocks

Available when survey documents created for this project

## Project documents

File	Checklist	Purpose(s)	Date uploaded	Actions
<a href="#">V14016-plan.pdf</a>		Approval documents received Survey sketch	2015-06-16	 Remove

[Contact ACLS](#) [Contact SGB](#) [Terms of Use](#) [Privacy policy](#)



# Request Survey Instructions

---

- At this point you can open up and see the documents you uploaded but you cannot delete them since you already requested instructions
- If you need to change a document, you will have to contact your CLU office

# My Projects

MyCLSS

[Version française]

Welcome Support SGB2 Ottawa  
My Projects My Profile Help Log Out

Research ▾

Authorizations ▾

Data and Tools ▾

Plan check ▾

Recording ▾

News ▾

Search

[Home](#) → [My Projects](#) → My Projects

## My Projects

+ New survey project

Archived projects +

1

2

3

Next →

Project Number	Status	Survey Project Description	Canada Lands	Survey Instructions
<a href="#">MyFile-001</a> SGB number: 201420007	Amendments Requested	Testing stage of Dev CLS Act Survey of Commissioners Land - GN administration	ARCTIC BAY	
<a href="#">LTA plan Nunavut</a> SGB number: 201420006	Instructions Issued	Test this process Land Titles Act - Compiled	IQALUIT (FROBISHER BAY)	
<a href="#">CLS Act Nunavut</a> SGB number: 201420005	Instructions Issued	TEST ING PROCESS CLS Act Survey of Commissioners Land - GN administration	IQALUIT (FROBISHER BAY)	



# My Projects

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- You see on this page the new project that you just created
- Things to note:
  - Status shows **Instructions requested**
  - When instructions are issued, it will show status: **Instructions Issued** with a date in blue. You can click on date and see (and print) instructions
  - The **Create a new Survey Document button** is disabled because you did not receive instructions yet
  - You can create a new project by clicking on **Create a New Project again**
  - If you click on project number, you will go to the project details page where you can view Survey Instructions and request an amendment

# My Projects

After SGB staff has issued survey instructions, an email message will be sent to the user and also the project pane will be updated with the Status column showing **Instructions Issued**. The issued instructions can be downloaded.

## My Projects

+ New survey project		Archived projects +		
Project Number	Status	Survey Project Description	Canada Lands	Survey Instructions
<a href="#">Test-SI-Input</a> SGB number: 201522006	Instructions Issued	Testing limitation in SI input Explanatory Plan	BEAVER LAKE INDIAN RESERVE NO. 17	<a href="#">Download</a>
<a href="#">Test-SI-input2</a> SGB number: 201521006	Instructions Issued	Testing S.I. input limit Parcel Survey	ESKASONI INDIAN RESERVE NO. 3	<a href="#">Download</a>
<a href="#">After-UAT</a> SGB number: 201518029	Instructions Issued	Testing after UAT fixes Parcel Survey	AKLAVIK	<a href="#">Download</a>
<a href="#">mlb 2015-01</a> SGB number: 201514041	Instructions Requested	Plan of survey of lot division Parcel Survey	SIX NATIONS INDIAN RESERVE NO. 40	
<a href="#">sb 0609-1</a> SGB number: 201514037	Instructions Requested	sb 0609-1 Parcel Survey	AKWESASNE RESERVE NO. 59	



# Create Survey Document

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- After completing your survey (or at beginning a survey if you prefer), you can now create a survey document (plan, report, field notes) in the system by clicking on the hyperlinked project number to access the tool. The Survey Documents tab is enabled. You will see the following:

# Create Survey Document

---

**Project: User-File-01 (SGB #201514008)**

PROJECT INFORMATION

SURVEY DOCUMENTS



**1 CREATE SURVEY DOCUMENT**

**2 COMPLETE CHECKLIST**

**3 SUBMISSIONS**

\* Survey Document Name

\* Survey Document Type

Select one



\* Denotes Required Field

Next



# Create Survey Document

---

- Things to note on this page:
  - The survey document is created after you supply the required input and click on the Next button
  - Decide on Survey Document Name - give it a name; something that means something to you
  - Select a Survey Document Type from the drop-down list in the input box



# Create Survey Document

Click Next to create the document

Project: User-File-01 (SGB #201514008)

PROJECT INFORMATION

SURVEY DOCUMENTS



1 CREATE SURVEY DOCUMENT

2 COMPLETE CHECKLIST

3 SUBMISSIONS

\* Survey Document Name

Document-1

\* Survey Document Type

Plan of Survey of Parcel

\* Denotes Required Field

Next

# Create Survey Document

- A survey document is created and the Complete Checklist tab is enabled
- You can create additional survey document by clicking on the + sign and giving it a new name
- Each survey document name becomes a tab under Survey Documents

PROJECT INFORMATION

SURVEY DOCUMENTS

Document-1

+

1 CREATE SURVEY DOCUMENT ✓

2 COMPLETE CHECKLIST □

3 SUBMISSIONS □

\* Survey Document Type

Plan of Survey of Parcel ▼

Update

ACLS Checklist Name

Not yet assigned

ACLS Checklist Number

Not yet assigned

ACLS Levy Form

Not yet processed

Next



# Create Survey Document

---

Some notes about previous page:

- You see in addition to survey document name and type some document milestones:
  - The Complete Checklist tab is highlighted. You click on the Next button to begin the ACLS Checklist process for this survey document
  - ACLS Checklist Name and ACLS Checklist Number show **Not yet assigned** because you did not yet complete a checklist
  - ACLS Levy Form shows **Not yet processed** for obvious reason
  - Other milestones will be displayed after you have completed a checklist (later)

# Create Survey Document

Since you selected the survey document type, the system provided all endorsement blocks for you. Click on the Project Information tab to access the project details page. Endorsement blocks are always located on the project details page, example:

Type of survey	Parcel Survey
SGB Contact	Kliaman, Cindy 606 - 55 St. Clair Avenue East Toronto, ON M4T 1M2 (416) 973-1006 cindy.kliaman@nrcan-mncan.gc.ca

## ▼ Survey Instructions

### Specific

[2015-07-06](#)

[Request Amendments](#)

## ▼ Reference and support documents

[National Standards for the Survey of Canada Lands](#)

## ▼ Endorsement Blocks

### Plan of Survey of Parcel

[2014-SGB1 \[CLSR #\]](#) [2014-SGB2 \[Signature CLS\]](#) [2014-SGB3 \[Project & Checklist #\]](#) [2014-E12 \[SGB s.29 - East\]](#)  
[2014-ON21 \[AANDC s.29 - ON\]](#) [2014-ON61 \[Certificate of Recording - ON\]](#) [2014-E15 \[SGB s.31 - East\]](#)

# Create Survey Document

---

- Sometimes, survey projects require more than one survey document
- You can create as many survey documents as you want by following the same procedure (click on the **+** or **+ADD** button as seen below)
- Be sure to give different names for each survey document

PROJECT INFORMATION		SURVEY DOCUMENTS
SD-1	SD-2	<b>+ Add</b>
Survey document type	Plan of Survey of Parcel	
ACLS Checklist Name	<a href="#">CL-1a</a>	
ACLS Checklist Number	<a href="#">5024A</a>	



# Create Survey Document

---

- Next step is to complete a checklist so click on the **Next** button to go the ACLS Checklist page

# Checklist Process

## You are now on ACLS section of System

### Create Checklist

PROJECT: 201514008 - Test project

TYPE OF SURVEY: Parcel Survey

SURVEY DOCUMENT: Document-1 - Plan of Survey of Parcel

SURVEYOR: Ottawa, Support SGB2

PERMIT HOLDER:

CHECKLIST NAME:

INCLUDES  
NATURAL  
BOUNDARY: ☐

INCLUDES  
GEOREFERENCING  
DATA: ☒

CANCEL

CREATE CHECKLIST



# Checklist Process

---

- Notes about previous page:
  - Same project and document information which are drawn from the project details page and are read only fields
- You are now at a point to create a checklist for your survey document
  - Enter a name for your checklist (again a name that means something to you)
  - If your plan has natural boundaries click on the box (the system will add this item to your checklist)
  - Then click on « Create Checklist » (lower right)
  - If you changed your mind about creating a checklist, click on « Cancel ».





# Checklist Process

---

Generating a checklist takes 10 to 20 seconds

- The screen confirms that checklist was created and you get following screen (the View/Update Checklist page):

# Checklist Process

## View / Update Checklist

[VIEW / PRINT CHECKLIST](#)[VIEW / PRINT EXTENDED CHECKLIST](#)[BACK TO PROJECT](#)[VIEW NOTICE OF FEES](#)[VIEW PRACTICE REVIEW](#)

PROJECT:	201514008 - Test project	
TYPE OF SURVEY:	Parcel Survey	
SURVEY DOCUMENT:	Document-1 - Plan of Survey of Parcel	
SURVEYOR:	Ottawa, Support SGB2	PERMIT HOLDER:

*CHECKLIST NAME:	Checklist-1
INCLUDES NATURAL BOUNDARY:	<input type="checkbox"/>
INCLUDES GEOREFERENCING DATA:	<input checked="" type="checkbox"/>

[SAVE CHECKLIST](#)[RESET CHECKLIST](#)[DELETE CHECKLIST](#)

Your checklist is comprised of the following categories. Please access each category sub-list and address each line item. Once all category sub-lists are complete you will be given the opportunity to submit the completed checklist to the ACLS.

Plan Title	0 of 13 complete
Legend	0 of 12 complete
Georeferencing	0 of 19 complete
Signatures	0 of 8 complete
Plan Diagram	0 of 39 complete
Background Information	0 of 7 complete
Plan legibility, format	0 of 8 complete
Survey Report	0 of 3 complete
Digital Spatial File	0 of 4 complete

[SUBMIT YOUR CHECKLIST TO ACLS](#)



# Checklist Process

---

Notes on previous page:

- Buttons at top:

- **View/Print Checklist** allows you to view checklist in PDF format and print if you prefer. This is for those who would prefer filling out checklist on hardcopy before doing it electronically
- « View Practice Review » and « View Notice of Fees » are disabled because we haven't submitted checklist and plan yet



# Checklist Process

---

- You also see information on project and survey document
- At center of screen you see 3 buttons:
  - **Save Checklist** that you can do at any time
  - **Reset checklist** erases all answers you entered in checklist and starts at the beginning
  - **Delete checklist** just deletes the whole checklist. For example if you forgot to « Include Natural Boundaries » or decided to change survey document type at some point and you need to regenerate a new checklist



# Checklist Process

---

- At bottom, you have the actual checklists sections (9 here)
- You select category by category and fill in answers for each item
- On the right it shows how many questions have been answered for each category
- Last button at bottom is disabled because you did not yet complete the checklist
- Select a category

# Checklist Process

## Checklist items all show Unanswered

### View / Update Checklist Items

Checklist Name: Checklist-1			
<input type="button" value="CANCEL"/>	<input type="text"/>	<input type="button" value="UPDATE"/>	<input type="button" value="UPDATE AND CLOSE"/>
Plan Title		0 of 13 complete	
<input type="checkbox"/>	CLSR and LTO/LRO plan number blocks present on the plan		
<input checked="" type="radio"/>	Unanswered	<input type="radio"/> Yes	<input type="radio"/> N/A
<input type="checkbox"/>	Specify Sheet x of n for multi sheet plans		
<input checked="" type="radio"/>	Unanswered	<input type="radio"/> Yes	<input type="radio"/> N/A
<input type="checkbox"/>	Plan of Survey of (boundary , parcel desginator, easement, row, licence, etc.) See mouse over for details		
<input checked="" type="radio"/>	Unanswered	<input type="radio"/> Yes	<input type="radio"/> N/A
<input type="checkbox"/>	Name and number of Reserve (spell out), National Park of Canada, etc.		
<input checked="" type="radio"/>	Unanswered	<input type="radio"/> Yes	<input type="radio"/> N/A
<input type="checkbox"/>	New Parcel designators shown, (Lot #, Block #, Quad, Road, Subdivision names...)		
<input checked="" type="radio"/>	Unanswered	<input type="radio"/> Yes	<input type="radio"/> N/A



# Checklist Process

---

- For each item, you must enter either **yes** or **N/A** if that item does not apply to your survey document
- On the right, there is a field for comments. Since checklist will be part of documents reviewed in Practice Review, we strongly suggest you add comments when you answer **N/A**



# Checklist Process

---

- After filling answers for a category, click on **Update** to save your answers or **Update and Close** to move on to another category.
- **Cancel** will erase answers for that particular category
- After clicking on **Update and Close**, it takes 10 to 15 seconds for numbers to change on right (complete). See next slide



# Checklist Process

Your checklist is comprised of the following categories. Please access each category sub-list and address each line item. Once all category sub-lists are complete you will be given the opportunity to submit the completed checklist to the ACLS.

Plan Title	13 of 13 complete
Legend	0 of 12 complete
Georeferencing	0 of 19 complete
Signatures	0 of 8 complete
Plan Diagram	0 of 39 complete
Background Information	0 of 7 complete
Plan legibility, format	0 of 8 complete
Survey Report	0 of 3 complete
Digital Spatial File	0 of 4 complete

[SUBMIT YOUR CHECKLIST TO ACLS](#)

## Select next category

# Checklist Process

At any time, if you just hold your cursor over a blue square (don't click) on left of an item you get information about the item

## View / Update Checklist Items

Checklist Name: Checklist-1

CANCEL

UPDATE

UPDATE AND CLOSE

Plan Title

0 of 13 complete

☐ CLSR and LTO/LRO plan number blocks present on the plan

☒ Unanswered

☐ Yes

☐ N/A

☐ Specify Sheet x of n for multi sheet plans

8.3 (25) In the top right-hand corner of each sheet, show the sheet number and the total number of sheets in the plan in this form:

Sheet \_\_\_\_ of \_\_\_\_ sheets.

☐ Plan of Survey of (boundary , parcel designator, easement, row, licence, etc.) See mouse over for details

☒ Unanswered

☐ Yes

☐ N/A

☐ Name and number of Reserve (spell out), National Park of Canada, etc.



# Checklist Process

---

- At any time, you can save your checklist and return to finish it later.
- If you do that, go to **My Projects** and click on the project number, you will see that the current survey document will open and the checklist name is hyperlinked. Click on the link or on the **Next** button to proceed with completing the checklist.

# Checklist Process

PROJECT INFORMATION

SURVEY DOCUMENTS

Test-1

Test-2

+ Add

1 CREATE SURVEY DOCUMENT ☒

2 COMPLETE CHECKLIST ☐

3 SUBMISSIONS ☐

Survey document type	Explanatory Plan
ACLS Checklist Name	<u>CL-test</u>
ACLS Checklist Number	Not yet assigned
ACLS Levy Form	Not yet processed

Next

To go back to checklist, click on the Checklist name or **Next**



# Checklist Process

---

- You have completed checklist and want to submit. Click on « SUBMIT YOUR CHECKLIST ».
- The checklist goes to ACLS and not to SGB. SGB staff never see the checklist.
- This takes you to the ACLS Levy Form which shows your checklist name and assigned number – next slide

# Checklist and Levy Form Process

## ACLS Levy Form

**Checklist Name: Checklist-1**

**Checklist Number: 206**

☐ Add your checklist number on the plan

# New Monuments Placed:

CALCULATE FEES



PLAN FEE: 75.00

MONUMENT FEE: 0.00

GST/HST: 9.75

**Total:** 84.75

NOTE: You are at the final stage of the plan submission process. After clicking on “ **Submit** ”, please send your final hard copy package as required by your specific survey instructions.

CANCEL



SUBMIT LEVY FORM





# Levy Form

---

- This process replaces the old Plan and Monument Report form in addition to completing the Checklist submission
- The check box confirms that you have added the checklist number to your plan
- You should add checklist number near your file and project number at bottom right of the plan under the certification note



# Levy Form

---

- Click check box to agree to add the checklist number on the plan before submitting
- Enter the number of new monuments placed (0 if none)
- Click on the Calculate Fee button
- If you change the number of monuments, you must click on Calculate Fees again to correct your invoice
- Click on « Submit Levy Form » which is enabled when all inputs have been supplied
- The levy form is submitted to the ACLS who will send you an invoice. You now get the following window (next page)



# Final Submission

Project: User-File-01 (SGB #201514008)

PROJECT INFORMATION

SURVEY DOCUMENTS

Document-1



1 CREATE SURVEY DOCUMENT

2 COMPLETE CHECKLIST

3 SUBMISSIONS

4 COMPLETED

ACLS Checklist Number

206

## Survey Plan

\* Survey plan with no signature

Browse...  
(PDF)

-- OR --

\* Survey plan digitally signed  
using Entrust

Browse...  
(PDF)

You must supply files of the following types before you may submit and finalize your survey document:

- Survey Plan
- Digital Spatial File

Survey Plans and Survey Reports will be shared with the ACLS Practice Review Committee.

## Associated Documents

Survey Report / Field notes

Browse...  
(PDF)

\* Digital Spatial File

Browse...  
(DWG,DXF)

Other

Browse...  
(PDF,JPG,JPEG,TXT,DWG,RTF,TIF,DXF)

Reset

Upload

Submit & Finalize



# Final Submission

---

- You need to upload a PDF plan with the checklist number on it and also a Digital Spatial File of the plan. The PDF is shared between the SGB and ACLS
- If you are following the Digital Signature Submission process for Plan Review, the PDF plan must be digitally and securely signed by you
- Upload the PDF Survey Report or Field Notes
- Upload any other optional file you may have
- If you are following the mylar process, you still need to upload the PDF plan without a digital signature and the digital spatial file; then send your returns by mail to SGB
- You can quit the project and do the submission another time
- You can view your completed checklist by clicking on the hyperlinked checklist number – see next slide

# Final Submission

Project: User-File-01 (SGB #201514008)

PROJECT INFORMATION

SURVEY DOCUMENTS

Document-1



1 CREATE SURVEY DOCUMENT

2 COMPLETE CHECKLIST

3 SUBMISSIONS

4 COMPLETED

ACLS Checklist Number

206

## Survey Plan

\* Survey plan with no signature

Browse...  
(PDF)

-- OR --

\* Survey plan digitally signed  
using Entrust

Browse...  
(PDF)

You must supply files of the following types before you may submit and finalize your survey document:

- Survey Plan
- Digital Spatial File

Survey Plans and Survey Reports will be shared with the ACLS Practice Review Committee.

## Associated Documents

Survey Report / Field notes

Browse...  
(PDF)

\* Digital Spatial File

Browse...  
(DWG, DXF)

Other

Browse...  
(PDF, JPG, JPEG, TXT, DWG, RTF, TIF, DXF)

Reset

Upload

Submit & Finalize



# Final Submission

---

- The next step is to submit final plan
- But before, you must obtain your approvals and signatures
- You can click on the project number to bring you back to the Upload page when you are ready to upload and submit your returns - see next slide



# Final Submission

---

- Upload each file
- You can remove any uploaded file (and replace it) from Project Documents before final submission
- The status of each uploaded file shows as Completed
- The Submit & Finalize button will be enabled only when the required files are uploaded – next slide

# Final Submission

Document-1 [Add](#)

1 CREATE SURVEY DOCUMENT [✔](#)

2 COMPLETE CHECKLIST [✔](#)

3 SUBMISSIONS [□](#)

4 COMPLETED [□](#)

ACLS Checklist Number 206

Survey Plan

Survey plan digitally signed using Entrust Completed

Associated Documents

Survey Report / Field notes Completed

Digital Spatial File Completed

Other [i](#)  [Browse...](#)  
(PDF,JPG,JPEG,TXT,DWG,RTF,TIF,DXF)

1 Survey Plans and Survey Reports will be shared with the ACLS Practice Review Committee.

[Reset](#) [Upload](#) [Submit & Finalize](#)

## Project documents

Showing 1 to 4 of 4 entries | Show [10](#) entries

Filter items

File <a href="#">↑↓</a>	Checklist <a href="#">↑↓</a>	Purpose(s) <a href="#">↑↓</a>	Date uploaded <a href="#">↑↓</a>	Actions
<a href="#">SI-request.pdf</a>		Approval documents received Survey sketch Additional comments Information regarding Status of Land	2015-05-01	<a href="#">Remove</a>
<a href="#">Plan-CLS.pdf</a>	206	Survey plan signed by surveyor	2015-05-04	<a href="#">Remove</a>
<a href="#">Report.pdf</a>	206	Survey Report / Field notes	2015-05-04	<a href="#">Remove</a>
<a href="#">DSF-1.dwg</a>	206	Digital Spatial File	2015-05-04	<a href="#">Remove</a>



# Final Submission

---

- After you have submitted your returns, you also see the following:
  - CLS Professional Review
  - ACLS Levy Form
  - Finalization and Submission and
  - SGB Final Submission Review
- The status beside these lines change with progress of your project

# Final Submission Status

Document-1 [Add](#)

1 CREATE SURVEY DOCUMENT

2 COMPLETE CHECKLIST

3 SUBMISSIONS

4 COMPLETED

**Submission complete**

Thank you for your Submission.  
The Surveyor General Branch and other agencies will be reviewing the survey documents.  
You will receive an email from SGB with additional information.

Survey document type

Plan of Survey of Parcel

ACLS Checklist Name

[Checklist-1](#)

ACLS Checklist Number

206

CLSR Number

Not available

CLS Professional Review

Complete

ACLS Levy Form

Complete

Finalization and Submission

Complete

SGB Final Submission Review

In progress

**Project documents**

Showing 1 to 4 of 4 entries | **Show 10** entries

Filter items

File	Checklist	Purpose(s)	Date uploaded	Actions
<a href="#">SI-request.pdf</a>		Approval documents received Survey sketch Additional comments Information regarding Status of Land	2015-05-01	Remove
<a href="#">Plan-CLS.pdf</a>	206	Survey plan signed by surveyor	2015-05-04	Remove
<a href="#">Report.pdf</a>	206	Survey Report / Field notes	2015-05-04	Remove
<a href="#">DSF-1.dwg</a>	206	Digital Spatial File	2015-05-04	Remove





## After Final Submission

---

- Once the plan is submitted, you can view what you submitted by clicking on the hyperlinked file name under Project Documents on the **Survey Documents** page (see previous slide)
- To view your checklist or notice of fee, click on the hyperlinked Checklist Name or Number to go to the ACLS Checklist page



## After Final Submission

---

After the digital submission, the « SGB Final Submission Review » line in your **Survey Documents** page will show « In Progress ». SGB staff will perform a review according to a Critical Issues list. If no critical issues are found, the status will change to « Complete » and eventually, a CLSR number will appear on your **Survey Documents** page.

Once the CLSR number is available and the Survey Document has been scanned, the CLSR number will be a link providing access to the official version of the Survey Document. See next slide:

# Plan Review Completed

## Project: User-File-01 (SGB #201514008)

### PROJECT INFORMATION

### SURVEY DOCUMENTS

Document-1



Survey document type Plan of Survey of Parcel  
ACLS Checklist Name [Checklist-1](#)  
ACLS Checklist Number [206](#)  
CLSR Number 102509 CLSR ON

CLS Professional Review	Complete
ACLS Levy Form	Complete
Finalization and Submission	Complete
SGB Final Submission Review	Complete

## Project documents

Showing 1 to 5 of 5 entries | Show 10 entries

Filter items

File	Checklist	Purpose(s)	Date uploaded	Actions
<a href="#">SI-request.pdf</a>		Approval documents received Survey sketch Additional comments Information regarding Status of Land	2015-05-01	<a href="#">Remove</a>
<a href="#">Plan-CLS.pdf</a>	206	Survey plan signed by surveyor	2015-05-04	<a href="#">Remove</a>



# Amend Survey Instructions

---

- At some point in your project, you may realize that you need amended survey instructions from SGB
- To request amended survey instructions, click on project number (from the My Projects page) to access the project details page then click on **Request Amendments** (see next slide)

# Amend Survey Instructions

## Project: User-File-02 (SGB #201518002)

### PROJECT INFORMATION

### SURVEY DOCUMENTS

#### ▼ Survey Information

Status	Instructions Issued
Survey Project Description	Another test survey
Client Reference Number	User-File-02
Permit holder	ALPINE LAND SURVEYS LTD.
Region of survey	NORTHWEST TERRITORIES
Location of survey	AKLAVIK
Type of survey	Parcel Survey
SGB Contact	Urso, David 5101 50th Avenue, P.O. Box 668 Yellowknife, NT X1A 2N5 (867) 766-8544 david.urso@nrcan-mcan.gc.ca

#### ▼ Survey Instructions

##### Specific

[2015-05-05](#)

[Request Amendments](#)

#### ▼ Reference and support documents

[National Standards for the Survey of Canada Lands](#)

#### ▼ Endorsement Blocks

Available when survey documents created for this project

# Amend Survey Instructions


---

- If no Checklist exists for this project, you will see this:

## Amendment request

---

**Project Number: 201518002**

 This area will allow you to specify your needs for a request to the issued instructions. Please supply pertinent information about the required amendments in the text area. Once you have submitted the information to request an amendment the project data will be locked to allow staff to prepare your amended instructions.

**Please describe your amendment**

\* Amendment needs

\* Denotes Required Field

Cancel

Next

# Amend Survey Instructions

- If a checklist already exists you see this:

## Amendment request

**Project Number: 201518002**

**i** This area will allow you to specify your needs for a request to the issued instructions. Please supply pertinent information about the required amendments in the text area. Once you have submitted the information to request an amendment the project data will be locked to allow staff to prepare your amended instructions.

## Select survey documents that the amendment affects

☒ SD-Test (207)

**i Note:** the ACLS requires completion of an amended checklist when amended survey instructions impact a survey document that has already received a checklist number. By identifying which survey documents are potentially affected by the amended survey instructions you will be given the opportunity to amend the checklists for those survey documents selected above. Once you have submitted the information to request an amendment the project data will be locked to allow staff to prepare your amended instructions.

Amended checklists can be created from the My Projects page after the amended instructions have been issued by the SGB

## Please describe your amendment

\* Amendment needs

\* Denotes Required Field

Cancel Next

# Amend Survey Instructions

---

On previous slide:

- Step one, you select which survey document is affected by the amendment. In this case there is only one document for that project
- Step two is a field for you to explain why you need amendment
- You then scroll down

If amendment will not affect any of the existing survey documents and may require the creation of an additional survey document in which case you would un-check all the survey documents listed



# Amend Survey Instructions

- Describe the amendment
- You can upload new documents if you choose

Please describe your amendment

\* Amendment needs

Amend the instructions.



Clear

Save



Add documents

File

No file chosen

Max. 25.00MB - of type: pdf

File contains

If all documents are contained in the same PDF, you only need to upload the document once and check the boxes to indicate what the document contains.

☒ Request amendment support file

\* Denotes Required Field

Upload

Submit amendment



# Amend Survey Instructions

---

- If your request for amendment affects a document that has already received a checklist number, an amended checklist will have to be done (please see Critical Issues PowerPoint presentation on how to create an amended checklist).
- You click on **Submit Amendment**

# Amend Survey Instructions

---

## Please describe your amendment

\* Amendment needs

Amend the instructions.

Clear

Save

## Add documents

File

Choose File No file chosen

Max. 25.00MB - of type: pdf

File contains

If all documents are contained in the same PDF, you only need to upload the document once and check the boxes to indicate what the document contains.

☒ Request amendment support file

\* Denotes Required Field

Upload

Submit amendment

# Amend Survey Instructions

Following screen will appear showing the Project Information page. Click on **My Projects** menu to go back to projects page


Project: User-File-02 (SGB #201518002)

PROJECT INFORMATION

SURVEY DOCUMENTS

## Warning: Survey Instructions Amendments Requested

This project is in a state of "Amendments Requested", therefore the project has been placed in a non-editable state.

 Your requested amendment has been sent!

### ▼ Survey Information

Status

Amendments Requested

Survey Project Description

Another test survey

Client Reference Number

User-File-02



# Amend Survey Instructions

---

When amended survey instructions have been issued, the Project Information page will show:

- the new status of Instructions Issued
- a hyperlinked date under the Survey Instructions (Specific) section
- enabled Request Amendment button
- a hyperlinked date for every previously issued instructions (see next slide)

# After Amended Survey Instructions

**Project: User-File-02 (SGB #201518002)**

## PROJECT INFORMATION

## SURVEY DOCUMENTS

### ▼ Survey Information

Status	Instructions Issued
Survey Project Description	Another test survey
Client Reference Number	User-File-02
Permit holder	ALPINE LAND SURVEYS LTD.
Region of survey	NORTHWEST TERRITORIES
Location of survey	AKLAVIK
Type of survey	Parcel Survey
SGB Contact	Urso, David 5101 50th Avenue, P.O. Box 668 Yellowknife, NT X1A 2N5 (867) 766-8544 david.urso@nrcan-mncan.gc.ca

### ▼ Survey Instructions

#### Specific

[2015-05-05](#)

[Request Amendments](#)

#### Previously issued

[2015-05-05](#)

### ▼ Reference and support documents

[National Standards for the Survey of Canada Lands](#)



# Amend Survey Instructions

---

- When new instructions are issued, you will receive an e-mail notification from MyCLSS once instructions are issued and the **Status** will show « Instructions issued » with a new date
- From there you can amend your checklist by following the amend checklist link(if a checklist number was issued before asking for an amendment) and create an amended checklist



# Project Closed

---

- Projects are closed by SGB
- When a project is closed, it will no longer appear in **My Projects** page
- It will appear in **Archived Projects** section
- Click on **Archived Projects** button on **My Projects** page
- Once a project is closed the information about it becomes Read Only





# Archived Projects

## My Projects

+ New survey project

Active projects +

Project Number	Status	Survey Project Description	Canada Lands	Survey Instructions
<a href="#">1234</a> SGB number: 201414057	Closed	TSET Boundary Maintenance Surveys	AKWESASNE RESERVE NO. 59	
<a href="#">44444444</a> SGB number: 201404017	Closed	test #2 with Shane CLS Act (Sec 31) - Registration Plan	PIKOGAN	
<a href="#">SGB number: 201320036</a>	Closed	tesfg CLS Act Field notes only - Reposting	BAKER LAKE	
<a href="#">SGB number: 201317110</a>	Closed	testlouis1	DAWSON - CALLISON PHASE II SUBDIVISION	



---

We hope you find the system user friendly and useful to you

If you have questions and concerns, please click on « Contact ACLS » for checklist section or « Contact SGB » for My Projects or help with Survey Instructions

Thank you