

NSW Planning Portal Agency Reference Group

Quarter 1 meeting

12 March 2024



Acknowledgement of Country

We acknowledge that today we meet on many Aboriginal lands.

We acknowledge the traditional custodians of the lands and we show our respect for elders past, present and emerging through thoughtful and collaborative approaches to our work.



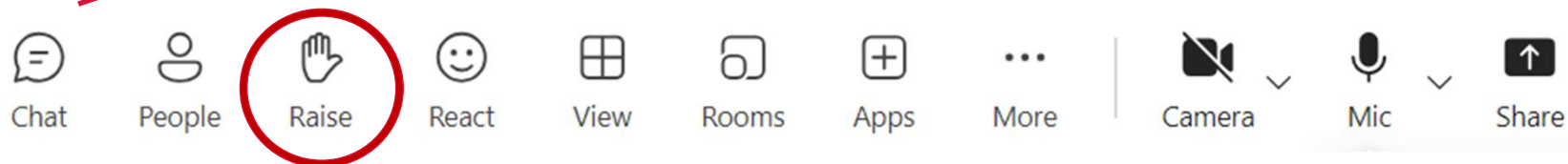
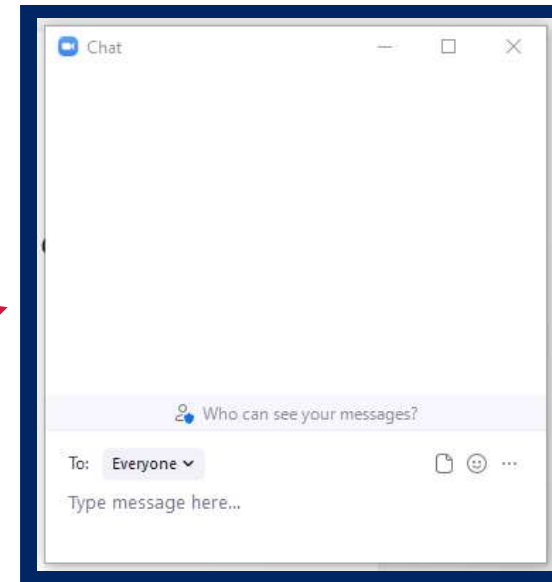
Agenda



No.	Description	Speaker
1	Acknowledgement of Country, Welcome and Introductions	Gino Cavallaro
2	Program Update: <ul style="list-style-type: none">• 2024 roadmap and MOG changes• Recent and upcoming releases	Vikrant Das Kimberly Everett
3	Update: Farming pre-assessment tool	Anthony Tavella
4	Update: Chatbot	Anthony Tavella
5	Update: Customer Support	Margaret Gomez
6	NSW Planning Portal Engagement <ul style="list-style-type: none">• Training calendar• NSW Planning Portal Knowledge Management working group	Caitlin Williams
7	Other matters	Andrew Schofield

Housekeeping

- Please mute your device unless asking a question.
- Press 'Raise Hand' to ask a question.
- You can also ask questions using the chat function. Any questions we do not discuss in the meeting, we will provide a response post-meeting.



NSW Planning Portal Agency Reference Group – Quarter 1 meeting

Actions from previous meetings

Actions from previous meeting



ID	Action	Responsible	Status
A23.4.1	Demonstrations of the standard document and standard response functionality within the CNR service to be organised with Ausgrid and DPE – Heritage.	Caitlin Williams / Ankur Choksi	COMPLETE (5 Feb 2024)
A23.4.2	Stacey Meadows requested that she be added to the distribution list for the NSW Planning Portal EDMs.	Caitlin Williams	COMPLETE

NSW Planning Portal Agency Reference Group – Quarter 1 meeting

Program update

Program update

Machinery of government changes



Machinery of Government (MoG) changes are being made to the NSW Planning Portal.

Changes that you will see:

1. Any reference to the former Department name, Department of Planning and Environment, will be updated to Department of Planning, Housing and Infrastructure. NB: This includes changes to acronyms.
2. Names of government agencies impacted by the MOG changes will be amended in the Concurrence and Referral service.
3. Updates to email notification footers to reflect the new Department's name.

Changes are being implemented in March and April 2024. Note: Date for Agency name changes TBC.

Agency names can be viewed in [Administrative Arrangements \(Public Service agencies and Ministers\) Order 2023](#)

Machinery of government changes



The following machinery of government changes were made on 1 March 2024:

Service	Amendment
Customer support	The email signature in the system-generated emails sent to customers from the customer support tool has been updated from “Department of Planning and Environment” to state “Department of Planning, Housing and Infrastructure”.
Site Compatibility Certificate	Reference to the Department has been amended to “Department of Planning, Housing and Infrastructure” in the system generated application forms where the labels have been changed .
State VPA / WIK	Reference to the Department has been amended to “Department of Planning, Housing and Infrastructure” in the What is this? help text for “Letter of Offer” document type and “Payment required” heading.
	The letterhead for the “Letter of Offer to enter into State Planning Agreement with the Minister for Planning and Public Spaces” has been amended the reference to the Department to “Department of Planning, Housing and Infrastructure”.
	Reference to the Department has been amended to “Department of Planning, Housing and Infrastructure” on the State VPA / Works in Kind agreement request application screen.

Machinery of government changes



The following machinery of government changes were made on 1 March 2024:

Service	Amendment
Multiple	The link to more information about the Privacy and Personal Information Protection Act 1998 within the Privacy Notice has been updated to “Department of Planning, Housing and Infrastructure” in the following services: Online DA – State / Online DA – Council / Post-consent Certificate (Occupation Certificate applications only)

Machinery of government changes



Additional updates will be made in the 5 April 2024 release. These include:

Service	Amendment
Concurrence and Referral service	<ul style="list-style-type: none">• Declaration on the “Create request” screen amended to reference the Department of Planning, Housing and Infrastructure.• Reference to the Department amended to “Department of Planning, Housing and Infrastructure” on the Intervention details screen within the Secretary’s Intervention Request.
Site Compatibility Certificate	Reference to the Department amended to “Department of Planning, Housing and Infrastructure” on the following screens: <ul style="list-style-type: none">• Relevance to SEPP application• Pecuniary interest application question• Confirmation of application submission
Special Infrastructure Contributions	Reference to the Department amended to “Department of Planning, Housing and Infrastructure” on the request application screen.

Machinery of government changes



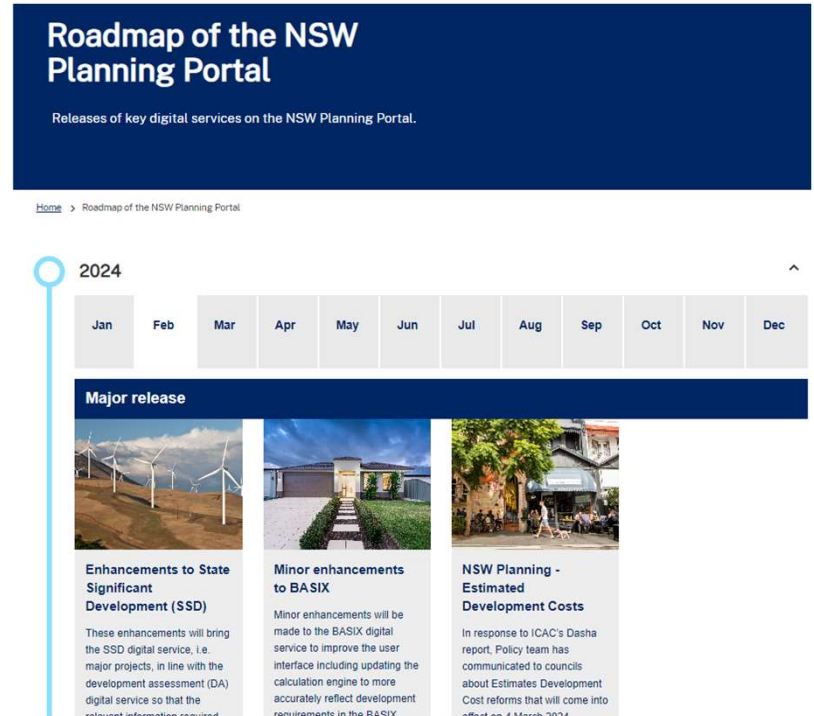
Service	Amendment
Multiple	The link to more information about the Privacy and Personal Information Protection Act 1998 within the Privacy Notice updated to “Department of Planning, Housing and Infrastructure” in the following services: Free Tree application / Special Infrastructure Contributions / State VPA Works in Kind agreement / Post-consent Certificate (CC, SC and SWC applications)
Online Submission System	Reference to the Department amended to “Department of Planning, Housing and Infrastructure” on the upload and submit screen.
Free Tree application	Declaration amended to: “I would like to receive updates from the Department of Planning, Housing and Infrastructure about the future free tree giveaways and the Greening our City work.”
NSW Planning Portal registration	DPIE user type amended to DPHI user
State VPA Works in Kind agreement	Reference to the Department amended to “Department of Planning, Housing and Infrastructure” on the “Pay to” field on the Payment required screen.

2024 NSW Planning Portal Roadmap

The Department has published the 2024 roadmap.

In 2024, there will be:

- three major releases: this includes the introduction of legislative and regulatory requirements, new services or functionality; and may have an impact on existing APIs
- minor releases: this includes minor process enhancements to existing services, minor policy amendments and will not require updates to APIs by the consumer.
- hotfixes to apply corrections to digital services. Note: The roadmap does not include details of these changes.



The screenshot shows the 'Roadmap of the NSW Planning Portal' page. At the top, it states 'Releases of key digital services on the NSW Planning Portal.' Below this is a navigation bar with a breadcrumb trail 'Home > Roadmap of the NSW Planning Portal'. A calendar for 2024 is displayed, with the month of January highlighted. Underneath the calendar, there is a section titled 'Major release' which contains three columns of information:

- Enhancements to State Significant Development (SSD)**: These enhancements will bring the SSD digital service, i.e. major projects, in line with the development assessment (DA) digital service so that the relevant information required...
- Minor enhancements to BASIX**: Minor enhancements will be made to the BASIX digital service to improve the user interface including updating the calculation engine to more accurately reflect development requirements in the BASIX...
- NSW Planning - Estimated Development Costs**: In response to ICAC's Dasha report, Policy team has communicated to councils about Estimates Development Cost reforms that will come into effect on 1 March 2024.

Access at: <https://www.planningportal.nsw.gov.au/roadmap-nsw-planning-portal>

Program update

Detail on recent and upcoming NSW Planning Portal releases

Recent minor release: 2 February 2024



Service	Enhancement
API	<ul style="list-style-type: none">Enhancements have been made to the existing Online DA v2 and State DA v1 service APIs to attach the owners consent document to the application.
BASIX	<p>This release addresses stakeholder reported technical issues including:</p> <ul style="list-style-type: none">incorrect details being shown in some BASIX certificatesBASIX certificates unable to be completed in some instancesuser interface fixes to address:<ul style="list-style-type: none">data entry fields not appearingerror messages being wrongly triggeredvalidation text not displaying or being incorrectUpdate to the version number shown in the footer of the BASIX Certificate.
Major projects	<ul style="list-style-type: none">Introduction of new fields on the pre-development application project details screen, when the development type is “In-fill Affordable Housing”. These mandatory fields will enable the percentage of in-fill affordable housing and the number of in-fill affordable dwellings to be reported .New fields on the project details screen for State Significant Development applications, when created from a pre-development application.

Recent major release: 1 March 2024



To support the reforms to the method of calculating development cost that came into effect on 4 March 2024, the following label changes were made:

Service	Existing label	Updated label
CDC	What is the estimated cost of work/development, including GST?	What is the estimated development cost, including GST?
DA (Council)	What is the estimated cost of work/development, including GST?	What is the estimated development cost, including GST?
	Capital Investment Value (CIV)	Estimated Development Cost
DA (State)	What is the estimated cost of the proposed development, including GST?	What is the estimated development cost, including GST?
	Capital Investment Value (CIV)	Estimated Development Cost
Major Projects	Capital Investment Value (exc GST)	Estimated Development Cost (excl GST)
Planning Panels Secretariat	What is the estimated cost of work/development, including GST?	What is the estimated development cost, including GST?

Recent major release: 1 March 2024



Service	Existing label	Updated label
Post-consent Certificate	Capital Investment Value (CIV) <i>NB: Construction certificate applications only</i>	Estimated Development Cost <i>NB: Construction certificate applications only</i>
	Please provide the estimated cost of development. Note: Please state the full contract price inclusive of GST <i>NB: Construction certificate and ITSOC applications and Building Works cases only</i>	Please provide the estimated development cost including GST <i>NB: Construction certificate and ITSOC applications and Building Works cases only</i>
Special Infrastructure Contribution	Capital Investment Value (CIV)	Estimated Development Cost
State Design Review Panel	Is the Capital Investment Value (CIV) confidential?	Estimated development cost confidential?
	Capital Investment Value (CIV)	Estimated Development Cost

Recent major release: 1 March 2024



In addition to the regulatory changes, the following enhancements were made:

Service	Enhancement
BASIX	<ul style="list-style-type: none"><li data-bbox="412 651 2168 786">• “In progress” BASIX Certificate applications will open in edit mode, on the page the user was last on when they logged out of the Portal. Note: Users can still use the “Edit” function with the Actions menu to update their “In progress” application.<li data-bbox="412 802 2168 898">• The question “Concrete slab on ground” has been removed from sub-section “5.1 Floors” in the “Material details” section for single dwelling applications.<li data-bbox="412 914 2168 997">• The calculation of fees for revised projects has been amended to request the fee for the additional unit/s only.

Upcoming minor releases



Release: April 2024

Service	Release summary
Post-consent Certificate	Enhancements will be made to improve user experience including: <ul style="list-style-type: none">• capture of address in building works case;• allowing developer to withdraw Strata Bond cases;• listing all available documents; and• pathway for developments with Decennial Insurance policies that are not exempt from Strata inspection scheme.
BASIX	Enhancements to address stakeholder feedback including: <ul style="list-style-type: none">• heating and cooling load feedbacks are being corrected to visually reflect the values in the progress bars• modifying the labels for Alterations and additions project types• modifying the warning message in revision of BASIX application• disabling some options in the Construction Tab - External wall types where options are not needed• wrong menus and Selections: Material details-Floor construction & materials are being updated to the correct ones

Upcoming releases



Release: April 2024

Service	Release summary
Post-consent Certificate	Enhancements will be made to improve user experience including: <ul style="list-style-type: none">• ability for developer to amend Expected Completion Amendment notice;• enhancements to Design and Building Practitioners Scheme (DBP) transitional arrangement pathway for Class 2 developments where Building work Commencement Date is prior to 1st July 2021; and• enhancements to Building Work workflow that assigns Building Compliance Declaration to the Building Practitioner at various stages
BASIX	<ul style="list-style-type: none">• Ability for an applicant to assign the payment of BASIX certificates to another party.• Ability for an applicant to pay for multiple BASIX certificates in one transaction.

Program update

Farming pre-assessment tool

Anthony Tavella

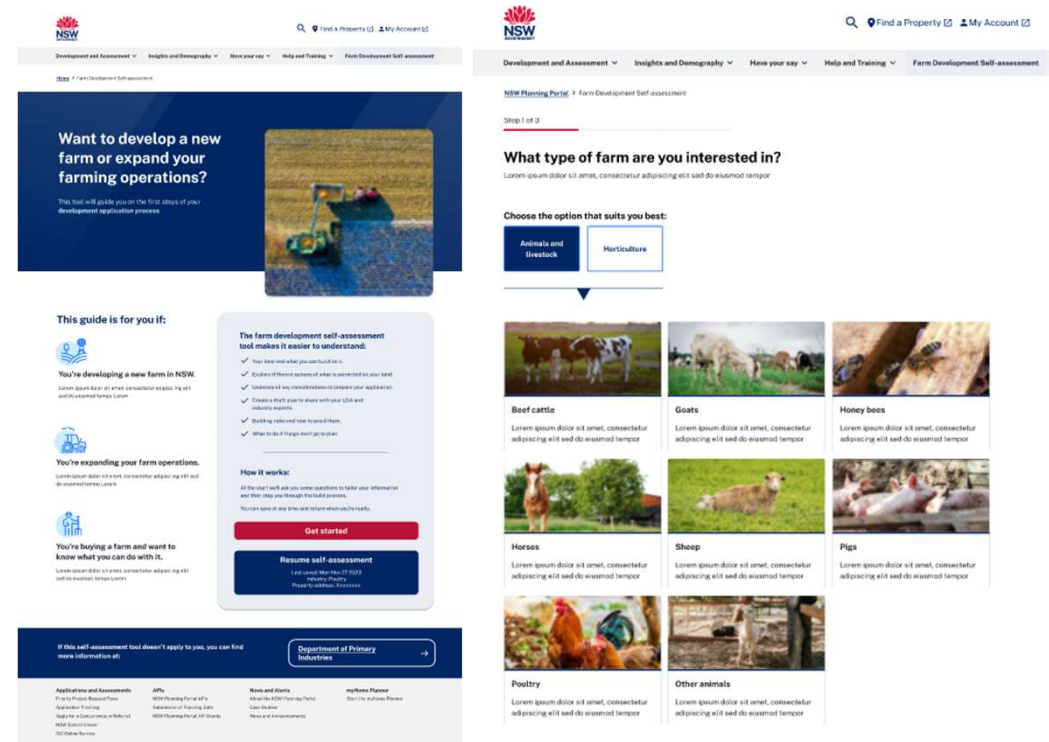
Farming pre-assessment tool



The Department is collaborating with the Department of Primary Industries, to develop a pre-assessment tool when applying for a development application and complying development certificates.

The tool utilises "rules as code" technology to identify the complexity, approval pathway and documents that are needed, when the application reaches the assessment phase.

The aim of the pre-assessment tool is to reduce assessment time frames and ensure better quality applications for councils and state agencies to assess.



Target delivery date(Beta version): June 2024

Program update

Chatbot

Anthony Tavella

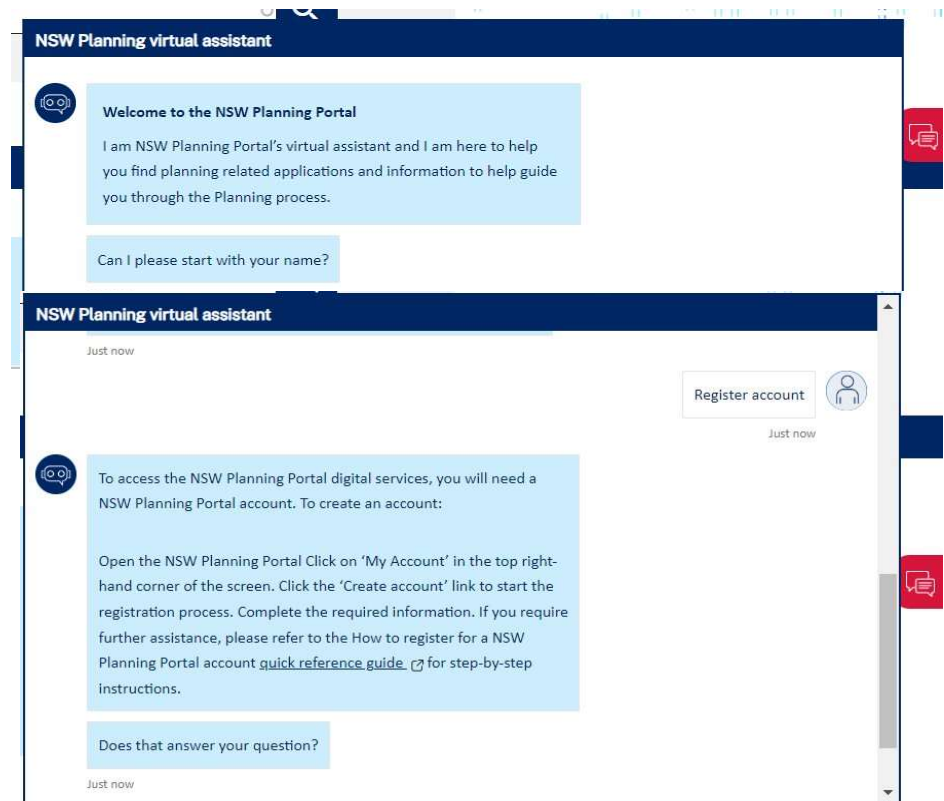
Update: Chatbot

The chatbot will:

- accessed on www.planningportal.nsw.gov.au
- guide NSW Planning Portal users to information most relevant to them
- assist users to obtain support using the NSW Planning Portal digital service tools without needing to contact support.

The tool will be initially released for testing before expanding the content available.

Target date: June 2024



NSW Planning Portal Agency Reference Group – Quarter 1 meeting

Customer support

Customer support Process

💡 **Did you know** the QRG's are being reviewed and updated on the Planning Portal website: <https://www.planningportal.nsw.gov.au/support/how-guides> ?

Please review the current QRGs for any questions you or the team may have before raising a ticket. This may assist in no tickets being raised and self-help achieved.

The team are currently actioning a backlog of tickets which we have reduced by 44% since Oct 2023.



Management of customer support service



To reduce the backlog of customer support tickets, the Department has:

- Mobilised internal resources to assist with the resolution of tickets;
- Provided training to those staff to ensure that they have the required knowledge;
- Triage of current tickets to close out duplications reducing the backlog number;
- Upskilling of SNSW to assist with incoming calls and enquiries to ensure efficiency for applicants at first point of contact;
- Daily stand up with our Technical team to ensure tickets sent to them are actioned in timeframe.

To improve the speed of response, the team is expanding available support materials, including Frequently Asked Questions and short How-to videos.

Management of customer support service



Service NSW can assist with:

- General enquiries
- Portal & Planning website navigation
- Applicant enquiries (The Portal)
- P-Ticket Status

L1 can assist with:

- General enquiries
- Exhibitions
- Policy & Legislative Changes
- Planning Proposals

L2 can assist with:

- Portal navigation
- Initial technical troubleshooting regarding Portal services
- Triaging cases for technical assistance

L3 can assist with:

- Investigation of technical issues
- Resolution of technical issues

NSW Planning Portal Agency Reference Group – Quarter 1 meeting

NSW Planning Portal engagement

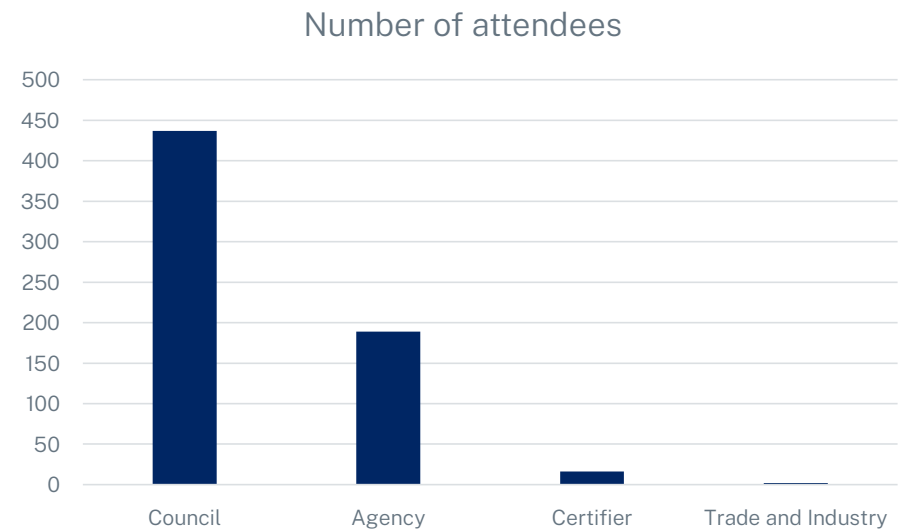
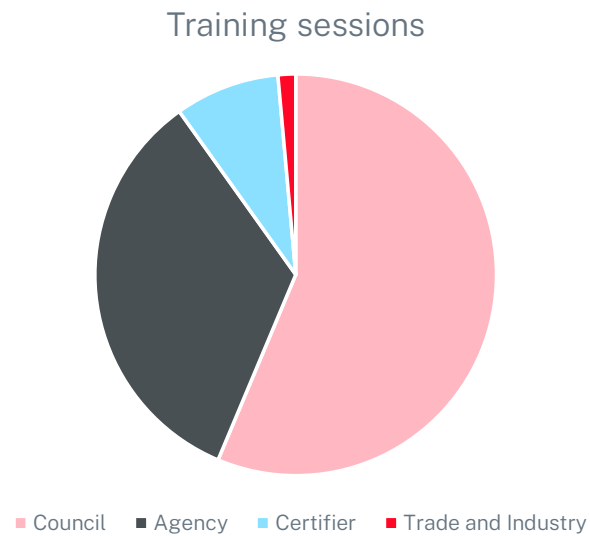
NSW Planning Portal engagement

Training on NSW Planning Portal digital services

Recent training

Period: 1 November 2023 to 6 March 2024

Since 1 November 2023, the team has hosted 24 training sessions for Agencies, which were attended by 189 people.



Training on NSW Planning Portal digital services



The training calendar for NSW Planning Portal digital services has been updated.

To register:

1. Click on the drop-down menu beside a month, to view the courses planned for that month.
2. Click on the drop-down menu beside the relevant subject to view the course details and registration link.
3. Click on the registration link and complete your details.

The screenshot shows a webpage titled "Help and Resources" with a sub-header "Information and Training Sessions". Below the header, there is a paragraph: "The NSW Planning Portal Training Team facilitates information sessions for Councils and State Agencies needing assistance using Online Digital Services." A breadcrumb trail reads "Home > Information and Training Sessions". Under the heading "Current Information Sessions", there is a note: "View the NSW Planning Portal Training Calendar, including session information, dates and times, below." A dropdown menu is open for "February 2024", showing a session titled "Council – Occupation Certificates". The session details are: "Date: 6 February 2024", "Time: 10:30am – 11:30am", "Audience: Councils", and "Details: This session will provide training in the various functions associated with the management of Occupation Certificates on the NSW Planning Portal." The registration link is "To register: <https://events.humanitix.com/occupation-certificates>".

<https://www.planningportal.nsw.gov.au/help-and-resources/information-and-training-sessions>

Training on the NSW Planning Portal digital services



NSW Planning Portal engagement

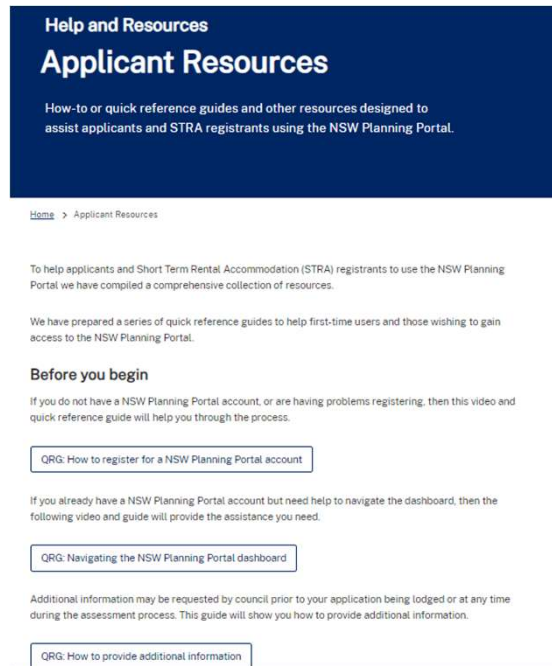
Review of Knowledge Management, including support resources

Review of knowledge management

- In November 2023, the Department formed an internal knowledge management working group.
- The working group is:
 - reviewing the existing user interaction with the knowledge management aspect of the NSW Planning Portal
 - developing a concept for the centralised help and resource page on the NSW Planning Portal (NB: The concept will be tested with stakeholders prior to implementation)
 - reviewing and updating the range of digital service Quick Reference Guides to ensure that the content is up-to-date and addresses stakeholder needs
 - creating additional FAQs to assist customer support.

NSW Planning Portal knowledge management

Support resources for **applicants** are located on the NSW Planning Portal.



Help and Resources
Applicant Resources

How-to or quick reference guides and other resources designed to assist applicants and STRA registrants using the NSW Planning Portal.

[Home](#) > Applicant Resources

To help applicants and Short Term Rental Accommodation (STRA) registrants to use the NSW Planning Portal we have compiled a comprehensive collection of resources.

We have prepared a series of quick reference guides to help first-time users and those wishing to gain access to the NSW Planning Portal.

Before you begin

If you do not have a NSW Planning Portal account, or are having problems registering, then this video and quick reference guide will help you through the process.

QRG: How to register for a NSW Planning Portal account

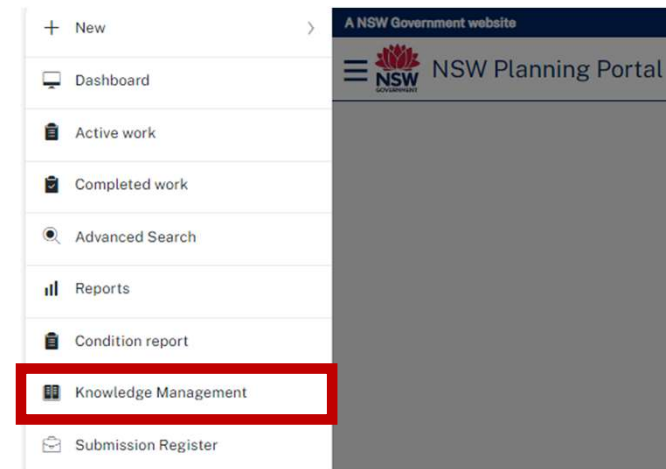
If you already have a NSW Planning Portal account but need help to navigate the dashboard, then the following video and guide will provide the assistance you need.

QRG: Navigating the NSW Planning Portal dashboard

Additional information may be requested by council prior to your application being lodged or at any time during the assessment process. This guide will show you how to provide additional information.

QRG: How to provide additional information

Support resources for **agencies, councils and certifiers** are accessed from the knowledge management menu item on the NSW Planning Portal.



A NSW Government website

NSW Planning Portal

- + New
- Dashboard
- Active work
- Completed work
- Advanced Search
- Reports
- Condition report
- Knowledge Management**
- Submission Register

NSW Planning Portal knowledge management



Goal

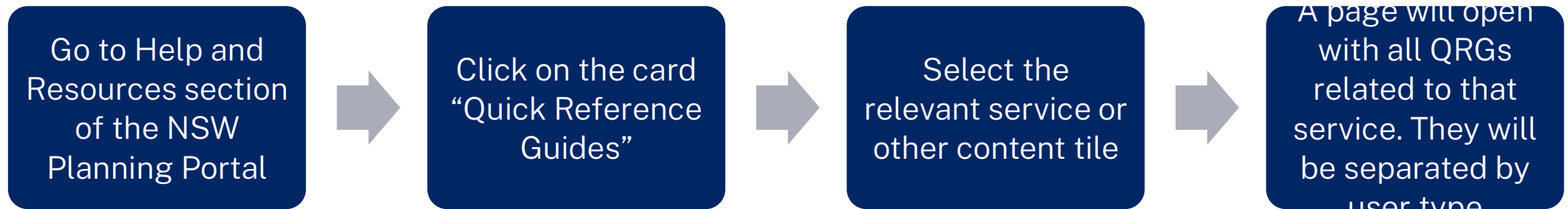
The support resources would all be accessed from the publicly accessible “Help and resources” page on the NSW Planning Portal.

Benefits

- Greater visibility of all aspects of the application process
- Improved understanding of the steps other users take in the process
- Greater content management efficiencies

Proposed concept

Illustrations for discussion only



Find a Property My Account

Insights and Demography Have your say **Help and Resources**

Quick Reference Guides
Quick reference guides and resources for each of the services
→

Concurrence and Referrals
Quick Reference Guides for Concurrence and Referral requests.
→

Introductory text for the service will display here.

Applicant

Council

Agency

NSW Planning Portal knowledge management



If you are interested in providing feedback on the concept for the new consolidated page, please email Caitlin Williams at caitlin.williams@planning.nsw.gov.au

Review of Quick Reference Guides



- The QRGs are being prioritised based on the service and frequency of requests to customer support.
- A targeted stakeholder survey was completed in February 2024, to inform the current structure, level of detail and information within existing QRGs. Some of the findings:
 - The length of the QRGs stakeholders were asked to review are suitable given the steps involved.
 - The level of detail included in the step and introduction was adequate.
 - The images are helpful but they could be blurry.
 - Stakeholders would like more information on the next steps, a table of contents for lengthy QRGs and any “tips and tricks” that would assist the user
 - Links to related QRGs as related QRGs can be hard to find.
- The feedback has been incorporated into the current review of the QRGs, where possible.

Timeframe: Q3 2024

NSW Planning Portal Agency Reference Group – Quarter 1 meeting

Other matters

Housekeeping



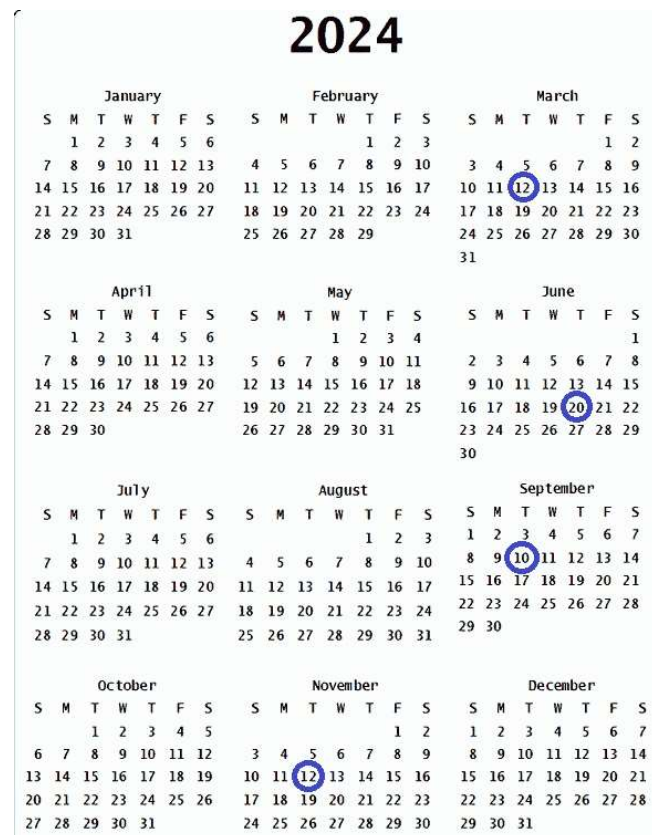
Terms of Reference

The terms of reference will be updated and circulated once approved by the Steering Committee.

2024 meetings

The proposed meeting dates for 2024 are:

- 12 March 2024
- 20 June 2024
- 10 September 2024
- 12 November 2024



Topics for future meetings

The agenda for the quarterly meetings will include the following standard updates:

1. Update on recent and upcoming NSW Planning Portal releases
2. Showcases / demonstrations of upcoming functionality, where possible
3. Updates on customer support and engagement activities relating to the NSW Planning Portal





Department of Planning and Environment