Responding to submission requirements

This guide provides steps on how an additional contact can respond to the submission requirements for a State Design Review Panel (SDRP) meeting via the NSW Planning Portal (the Portal).

When a registered portal user (the applicant) creates an SDRP application in the Portal, they nominate a primary contact who is by default assigned the application.

The applicant may also nominate **two additional contacts** when creating the application. An additional contact is intended to be a backup for the primary contact. They may also be project team members who need to input information and/or upload documents.

Only the nominated primary and additional contact/s will have the ability to edit/write in the application. They will also receive all correspondence relating to the application.

Pre-requisites:

- The additional contact/s **must** have an online NSW Planning Portal account (login ID and password) to access an SDRP application.
- The applicant has nominated the additional contact when creating the application and provided the email address the additional contact/s uses to log in to the Portal.
- The additional contact has received an email notification outlining the SDRP's submission requirements.

A red asterisk (*) indicates a mandatory field or document.

Overview

- When the SDRP design advisor sends the submission requirements via the Portal:
  - The system creates four tasks/steps for the primary and/or additional contact/s to complete sequentially:
    1. Update Contact Details (incl. meeting attendees)
    2. Additional Project Information
    3. Other Related Project Information
    4. Requirements and Uploads (the Design Package).
- The additional contact must assign themselves to each of the above submission requirements tasks/steps individually.
- The SDRP application (also known as the 'parent case') has 'child cases' that run in parallel with the main application and with each other. Types of child cases include a meeting case, a submission requirements case, and additional information. The child cases allow SDRP team members and the primary/additional contact/s to work on different tasks at the same time.

- The primary/additional contact/s can request as many meetings as required for an SDRP application. Whenever a new meeting is initiated, the system will create a new meeting child case as well as a new submission requirements child case.

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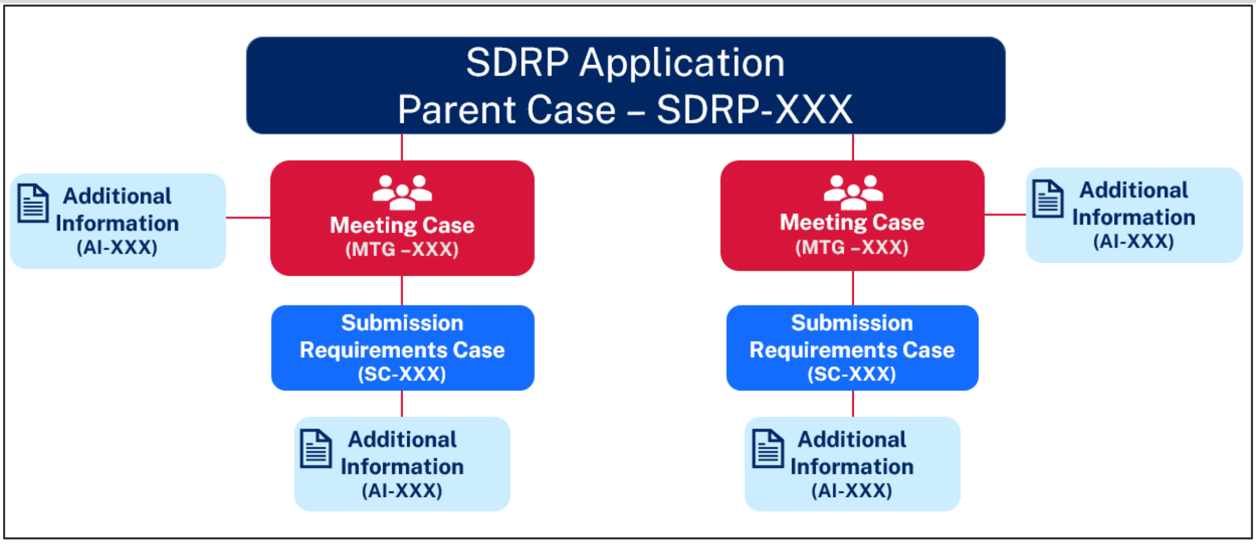
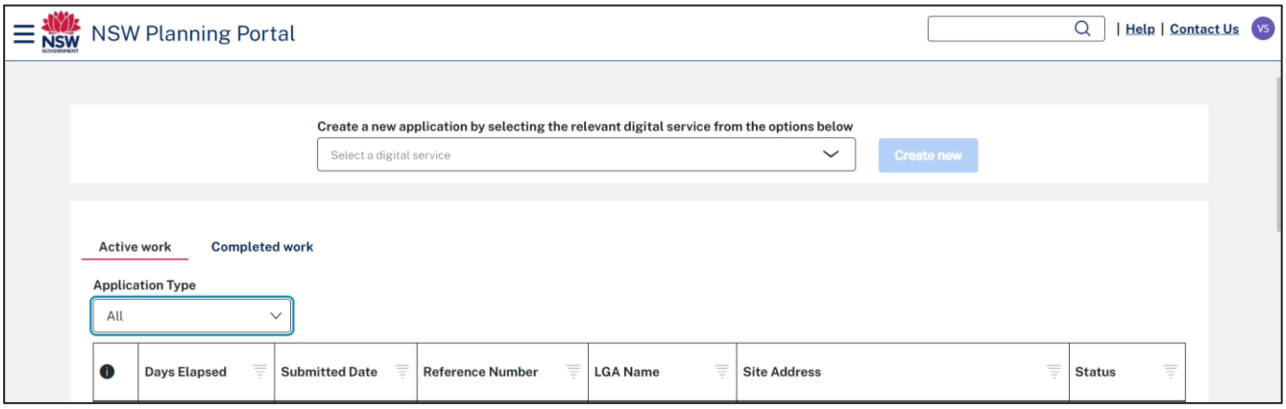


- The email notification outlining the submission requirements includes the SDRP application reference number (SDRP-XXX) and a submission requirements child case reference number (SC-XXX).
- The primary/additional contact must respond to the submission requirements via the submission requirements child case.
- When you click on a task belonging to a child case, you will see information only about that child case.

Locating the submission requirements case

1. **Log in** to the Portal to display your dashboard.

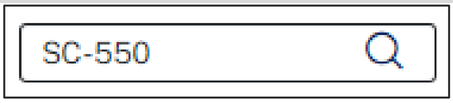


Note: Additional contacts will not see the SDRP application (SDRP-XXX) or submission requirements case (SC-XXX) reference numbers on their dashboard as they are not automatically assigned to the SDRP application.

Respond to the submission requirements via the submission requirements case.	

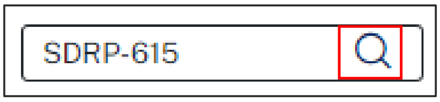
2. **Search** for the submission requirements case by using the global search field at the top right of the screen.

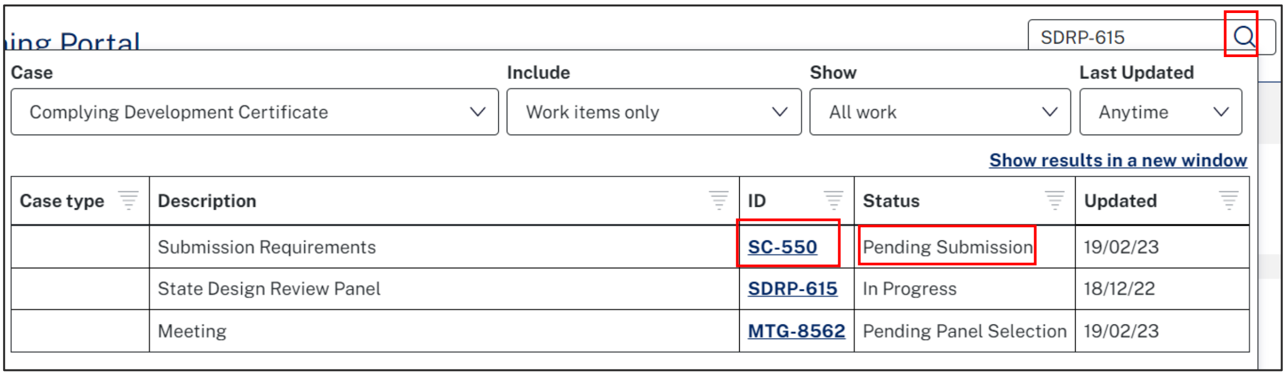
   Enter the SC-XXX reference number and **press** [Enter] on your keyboard to locate and open the submission requirements case.



Alternatively, you can enter the SDRP-XXX reference number in the global search field. **Click** the magnifying glass and from the drop-down, **select** the SC–XXX reference number.

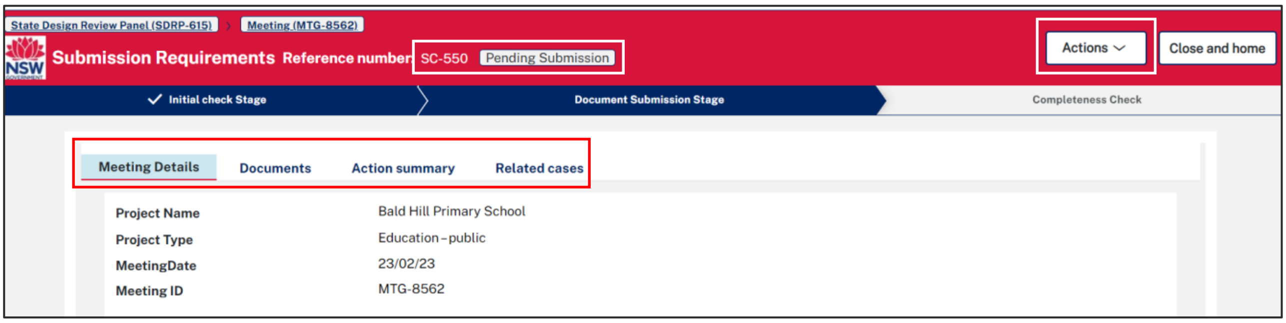
Note: The status is ‘Pending Submission’.





Case type	Description	ID	Status	Updated
	Submission Requirements	SC-550	Pending Submission	19/02/23
	State Design Review Panel	SDRP-615	In Progress	18/12/22
	Meeting	MTG-8562	Pending Panel Selection	19/02/23

The submission requirements case opens. This is a read-only screen.



Four tabs display:

- Meeting Details – includes the project's name, the type of project, and the date and reference number for the meeting (MTG-XXXX).
- Documents – will include links to documents uploaded via the submission requirements case, including any system-generated documents.
- Action summary - under History, you will find a record of all tasks performed for the submission requirements case, and under Case narrative, all system-generated email notifications related to the submission requirements case.
- Related cases – this tab contains links to the SDRP application (parent case) and all related child cases, including the meeting case/s and submission requirements case/s.

Assigning the 'Update Contact Details' task

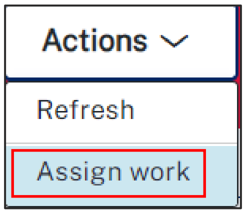
The system automatically assigns all submission requirements tasks to the primary contact.

To respond to the submission requirements, an additional contact must assign themselves one task at a time.

Follow the steps below to assign yourself the first task related to the SDRP submission requirements.

Assign yourself the first task via the submission requirements case (SC-XXX).

3. **Click** the Actions drop-down in the top right-hand corner of the screen and **select** Assign work.



The Assign work screen displays. By default, the primary contact is the current assignee.

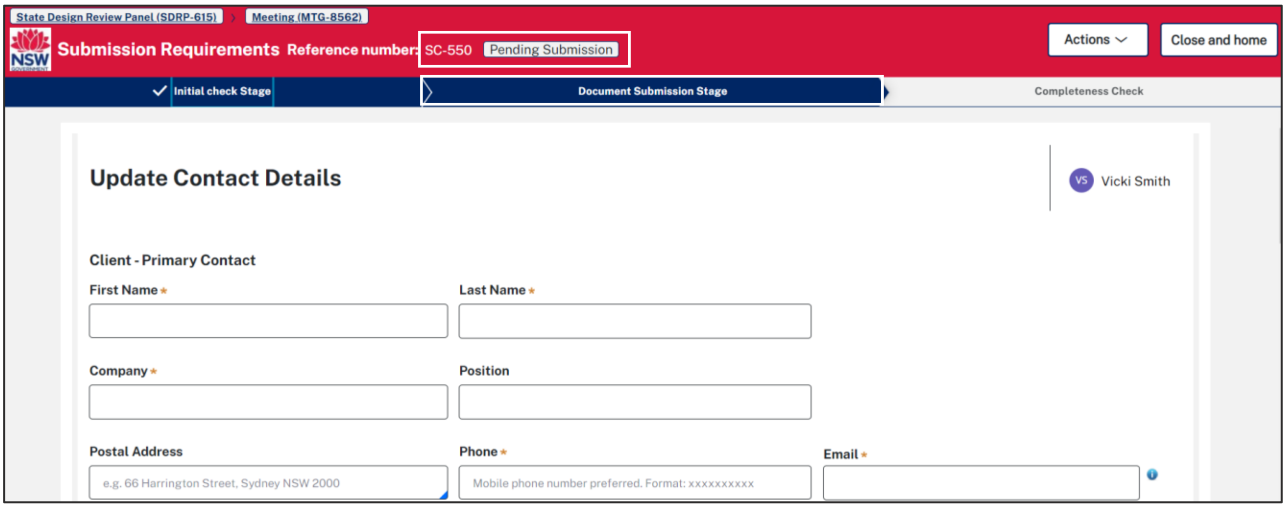
4. **Select** the 'Assign this task to me' tick box.

5. **Click** Submit to assign yourself the 'Update Contact Details' task.

Capturing contact details

The Update Contact Details screen displays. The status is ‘Pending Submission’.

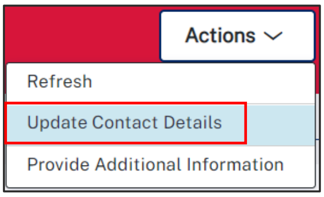
The contact details and meeting attendees are due no later than **two weeks** before the meeting date. The system will send a reminder notification two days before the due date.



Note: When an SDRP meeting follows a previous panel meeting for an SDRP application, the system automatically populates the document submission screens with information from the previous meeting.

The additional contact can review and update all fields as needed.

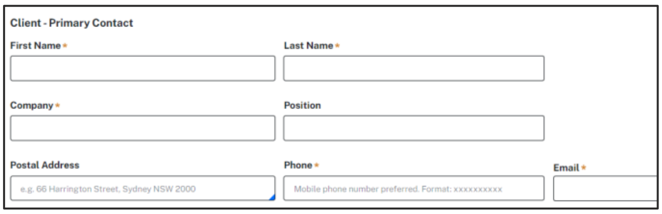
Tip: If the ‘Update Contact Details’ screen has not opened, **click** the Actions drop-down (top right-hand corner of the submission requirements case screen) and **select** Update Contact Details.



Client – Primary Contact

The client’s primary contact is an individual from the entity or organisation that is commissioning and funding the project directly or indirectly (the owner).

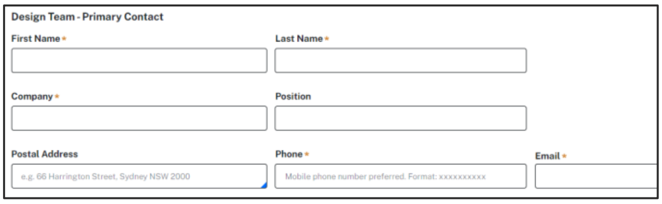
6. **Enter** the contact details for the Client - Primary Contact.



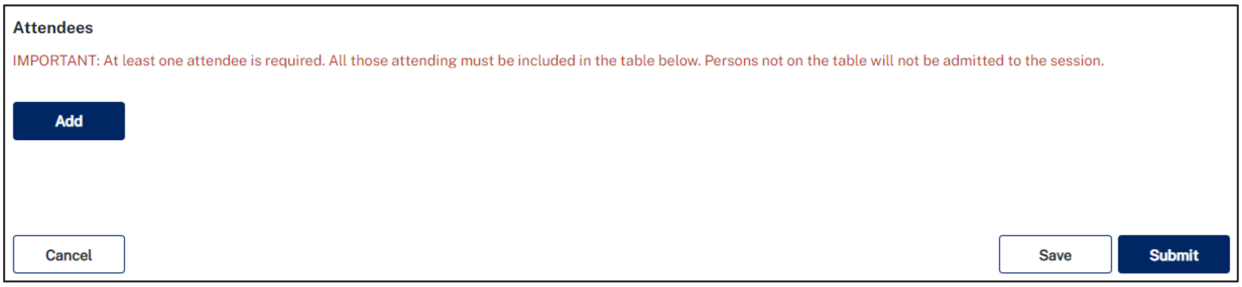
Design Team – Primary Contact

The design team's primary contact is an individual who is part of the proponent's design team.

7. **Enter** the contact details for the Design Team - Primary Contact.



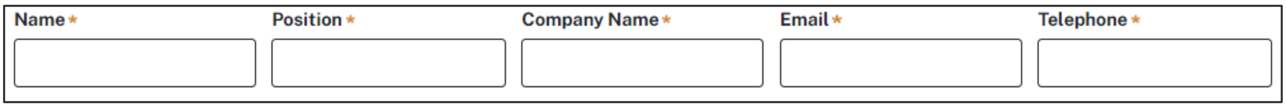
Capturing meeting attendees



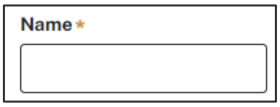
The proponent must have at least one representative attend the SDRP meeting. All meeting attendees must be listed in the table on this screen. There is no limit to how many attendees you can add.

Note: Only added attendees included in this table will receive a meeting invitation.

8. **Click** Add to add a meeting attendee.

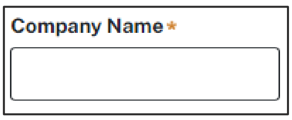


9. **Enter** the attendee's full Name.

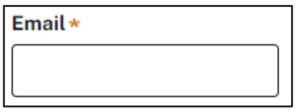


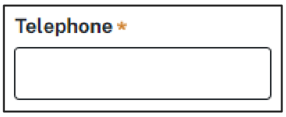
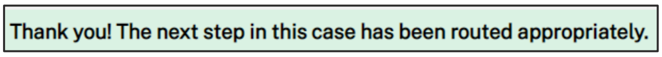
10. **Enter** the attendee's Position.

11. **Enter** the attendee's Company Name.



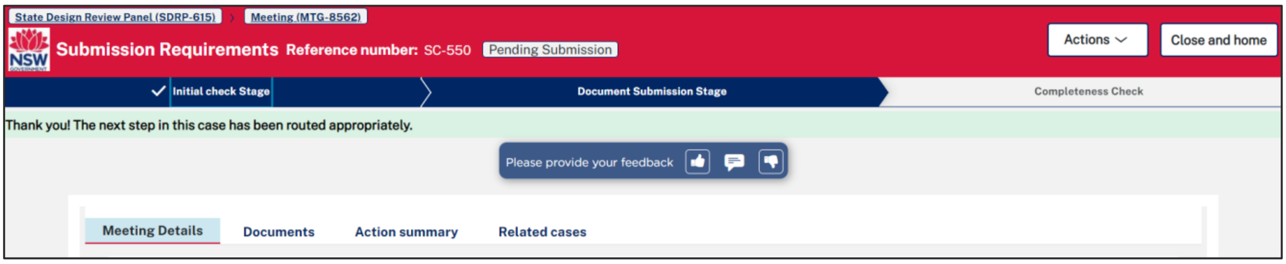
12. **Enter** the attendee's Email address.



13. **Enter** the attendee's Telephone number. **Note**: The telephone number should be at least 10 characters long.	
14. To add additional attendees, **click** Add and repeat **Steps 9** to **13**.	
Note: If required, **click** Delete to remove an attendee from the list.	
15. **Click** Submit to complete this task.	

When you click Submit, an email notification is sent to the SDRP team advising them that the proponent's contact details and meeting attendees have been provided.

A read only screen will display.



Note:

- Once the 'Update Contact Details' task is completed, the system automatically assigns the next task 'Additional Project Information' to the primary contact.
- To complete the 'Additional Project Information' task, an additional contact must assign it to themselves.

Updating contact details and meeting attendees

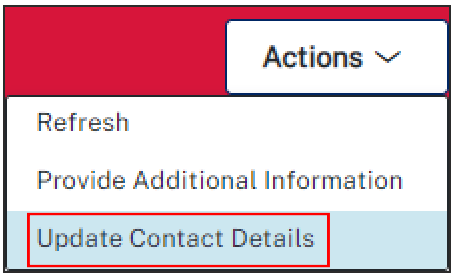
Once you have assigned yourself a task in the 'Documents Submission Stage', you can update the client contact details and/or meeting attendees via the Actions menu of the submission requirements case.

To update the contact details or add/remove meeting attendees:

a. **Click** on the Actions drop-down in the submission requirements case.

b. **Select** Update Contact Details to return to the Update Contact Details screen.

c. **Update** as required and **click** Submit.

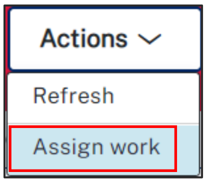


Note: Whenever you update the contact information and/or meeting attendees, the SDRP team is notified, and an updated Contact Information form is generated. The updated Contact Information form is saved in the Documents tab.

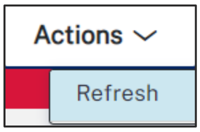
Assigning the 'Additional Project Information' task

Assign yourself the 'Additional Project Information' task via the submission requirements case (SC-XXX).

1. **Click** on the Actions drop-down and **select** Assign work.

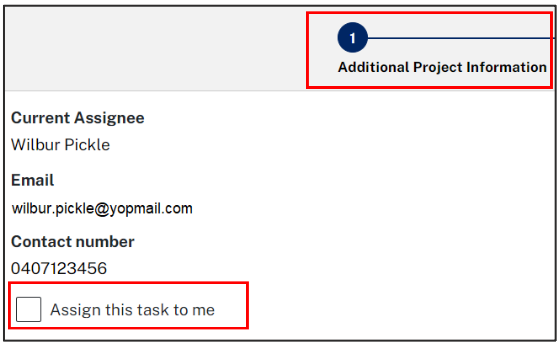


Tip: If the Assign work option does not display in the Actions drop-down, **click** Refresh and **click** on the Actions drop-down again and it should display.



The Assign work screen displays. By default, the primary contact is the current assignee.

2. **Select** the 'Assign this task to me' tick box.

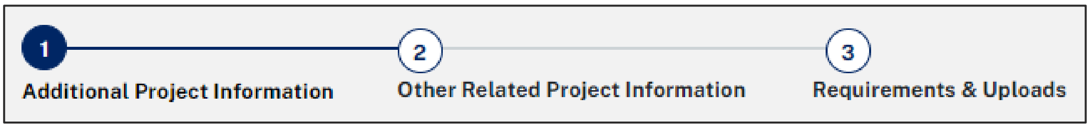


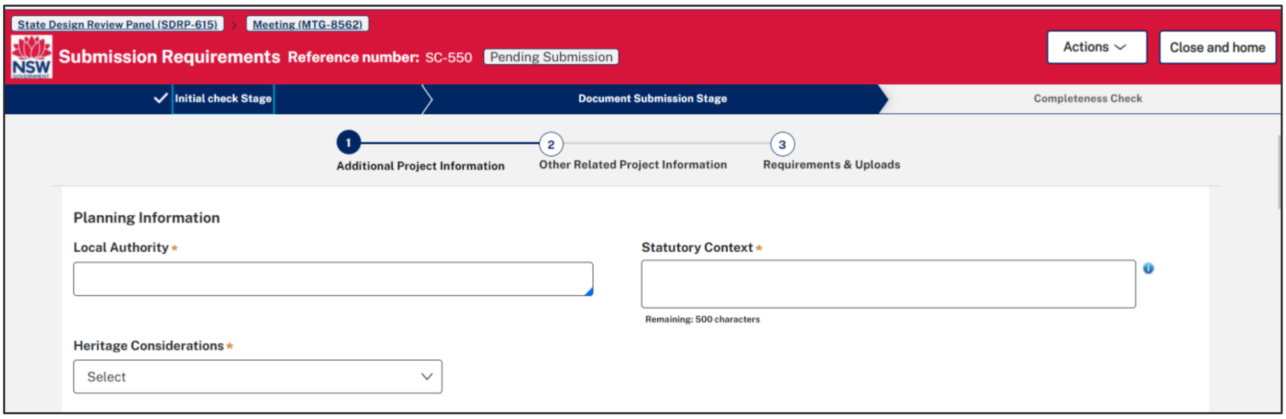
3. **Click** Continue to assign yourself the second task, 'Additional Project Information'.

Additional Project Information

The Additional Project Information screen displays.

This section of the Document Submission Stage includes three tasks/steps and is due no later than **one week** before the meeting date.



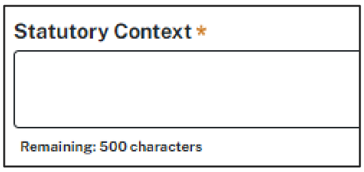


Planning Information

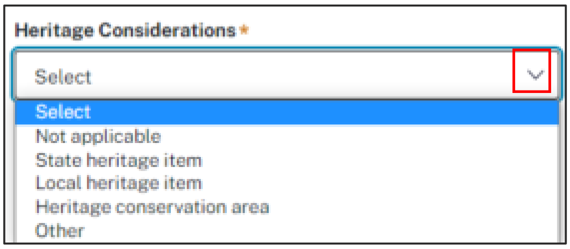
4. **Enter** the Local Authority. As you begin to type, the system will auto-suggest local authorities based on the information entered. **Select** the correct local authority from the list.

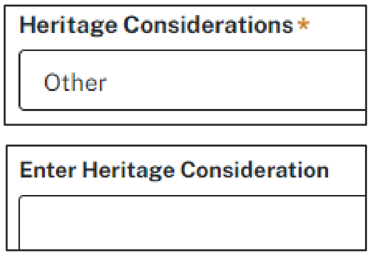
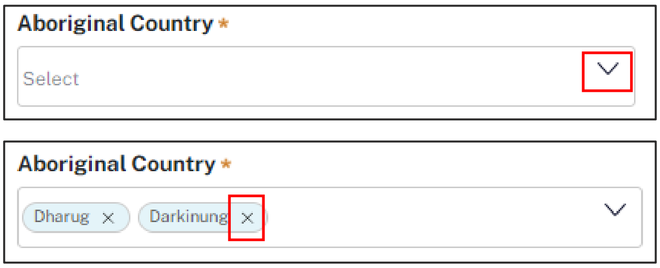
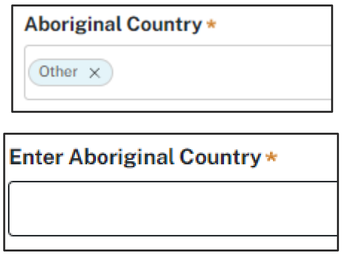
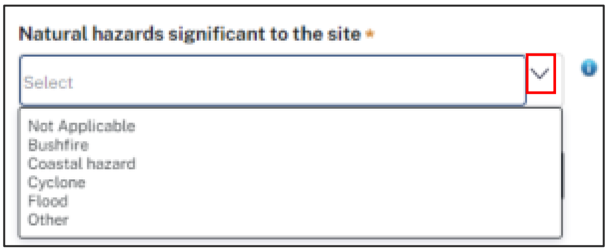
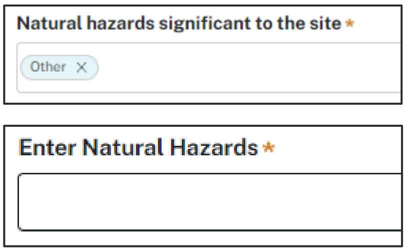
5. **Enter** the Statutory Context in 500 characters or fewer.

Note: Planning and statutory constraints applicable to the project.



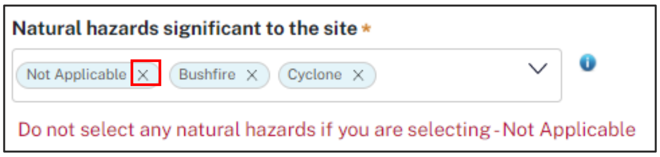
6. **Click** the Heritage Considerations drop-down and **select** from the available list.



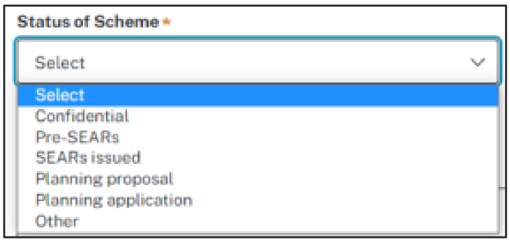
Note: If there are heritage considerations, but none of the considerations listed are applicable, **select** Other and **enter** the Heritage Consideration manually in the added text field.	
7. **Click** the Aboriginal Country drop-down and **select** from the available list. **Note:** You can select more than one Aboriginal Country. To remove a selected Aboriginal Country, **click** on the × next to it.	
Note: If none of the Aboriginal Countries listed are applicable, **select** Other and **enter** the Aboriginal Country manually in the added text field.	
8. **Click** the Natural hazards significant to the site drop-down and select from the available list. **Note:** You can select as many natural hazards as needed. If natural hazards are not applicable, select 'Not Applicable'.	
Note: If there are natural hazards, but none of the natural hazards listed are applicable, **select** Other and **enter** the natural hazard/s manually in the added text field.	

Note: If you select 'Not Applicable' PLUS a natural hazard/s, an error message will display when you click Continue in the bottom right-hand corner of the screen.

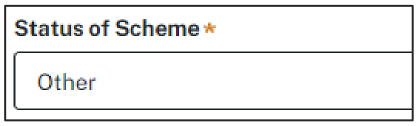
You can remove a selected hazard or 'Not Applicable' by clicking the × next to it.

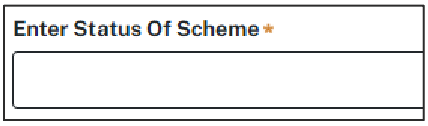


9. **Click** the Status of Scheme drop-down and **select** from the available list.



Note: If none of the status listed are applicable, **select** Other and **enter** the Status of Scheme manually in the added text field.





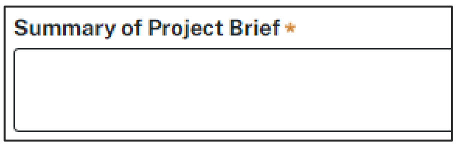
Project Background

The Project Background and Project Description fields are mandatory. Each field is limited to 1,000 characters.

The information entered should be comprehensive and concise as it will be sent to the panel members before the SDRP meeting.

10. **Enter** a Summary of the Project Brief.

Note: List or describe the main elements of the brief.



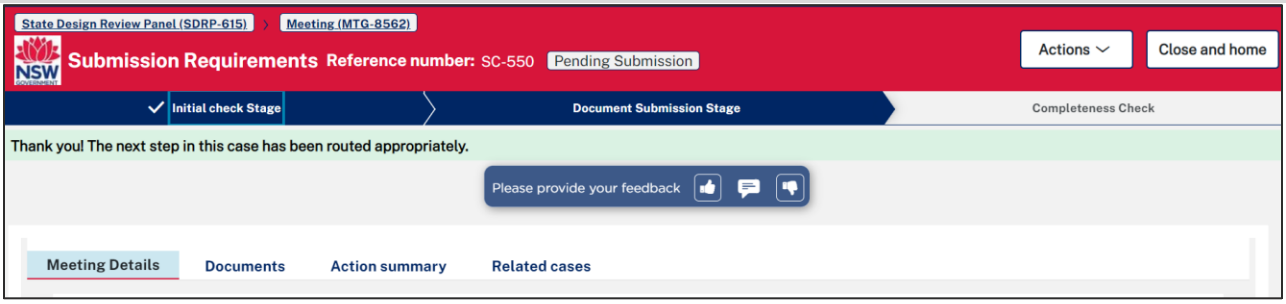
11. **Enter** a brief outline of the conceptual intent in the Design Objectives field.

Project Description

Provide a description of the project under the headings below. Please base your descriptions on the Design Objectives for NSW detailed in the Better Placed Design Policy document. **Click** on the link provided on the screen Click here for these objectives to open this document in a separate tab allowing you to keep it open as reference while you complete the submission requirements.

12. **Describe** the physical attributes of the site and prevailing or desired local character in the **Context** field.	Context *
13. **Describe** the project's Connecting with Country strategy and engagement with local communities in the **Connecting with Country** field.	Connecting With Country *
14. **Describe** the urban design strategy and how the built form achieves that strategy in the **Urban Design/Built Form** field.	Urban Design/Built Form *
15. **Describe** the approach to vehicular traffic, active transport, pedestrian links, etc. in the **Connection** field.	Connection *
16. **Describe** the project's sustainability strategy and targets, as well as how the project contributes to a NET-zero by 2050 target in the **Sustainability** field.	Sustainability *
17. **Describe** how the project relates to and improves the public realm in the **Public Realm** field.	Public Realm *
18. **Describe** the project's landscape strategy and targets in the **Landscape** field.	Landscape *
19. **Click** Continue to complete this task.	Continue Thank you! The next step in this case has been routed appropriately.

A read only screen will display.



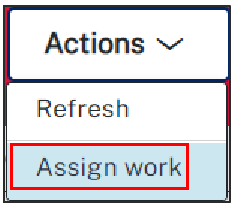
Note:

- Once the 'Additional Project Information' task is completed, the system automatically assigns the next task 'Other Related Project Information' to the primary contact.
- To complete the 'Other Related Project Information' task, an additional contact must assign it to themselves.

Assigning the 'Other Related Project Information' task

Assign yourself the 'Other Related Project Information' task via the submission requirements case (SC-XXX).

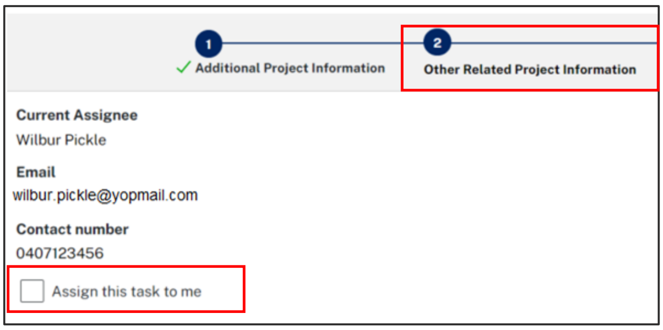
1. **Click** on the Actions drop-down and **select** Assign work.



Tip: If the Assign work option does not display in the Actions drop-down, **click** Refresh and **click** on the Actions drop-down again and it should display.

The Assign work screen displays. By default, the primary contact is the current assignee.

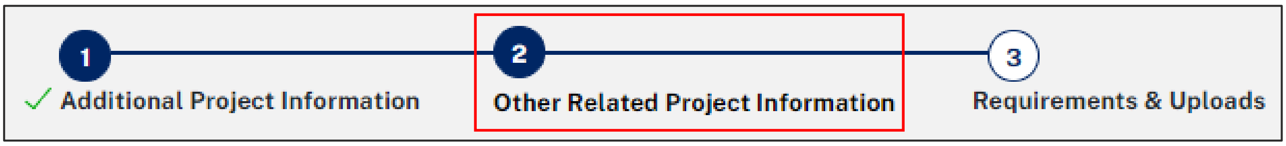
2. **Select** the 'Assign this task to me' tick box.

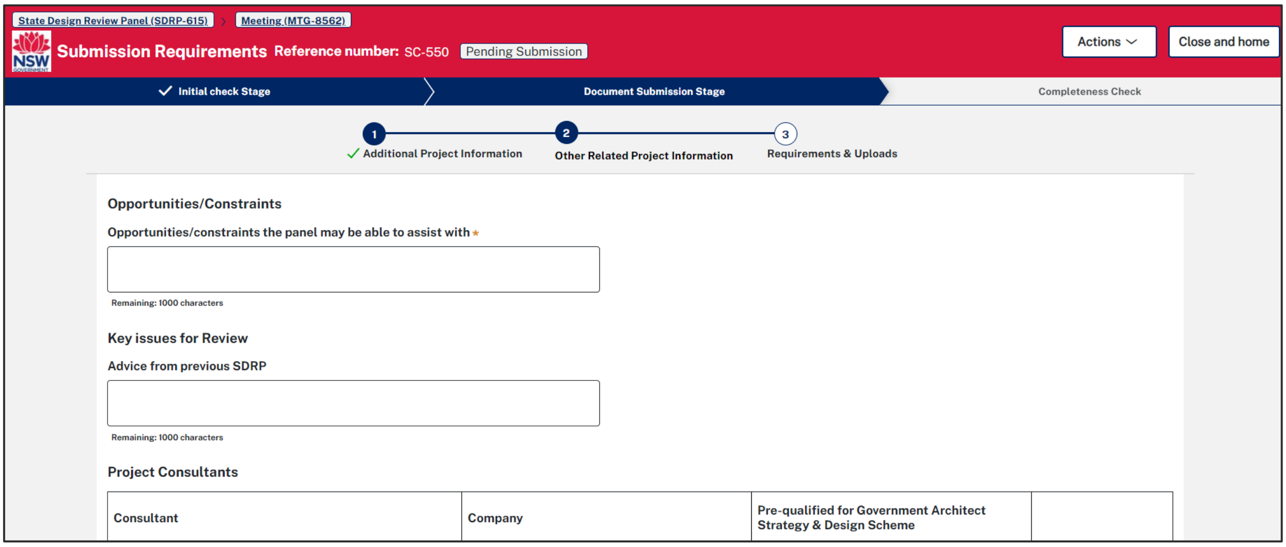


3. **Click** Continue to assign yourself the next task, 'Other Related Project Information'.

Other Related Project Information

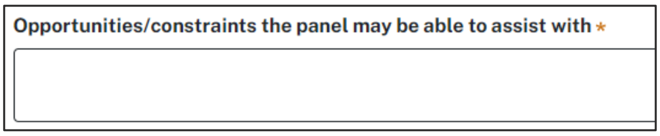
The Other Related Project Information screen displays.





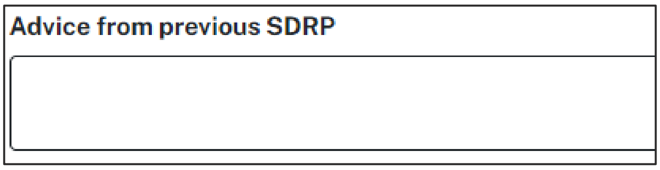
Opportunities/Constraints

4. **Enter** opportunities/constraints the panel may be able to assist with. In 1000-characters or fewer.



Key Issues for Review

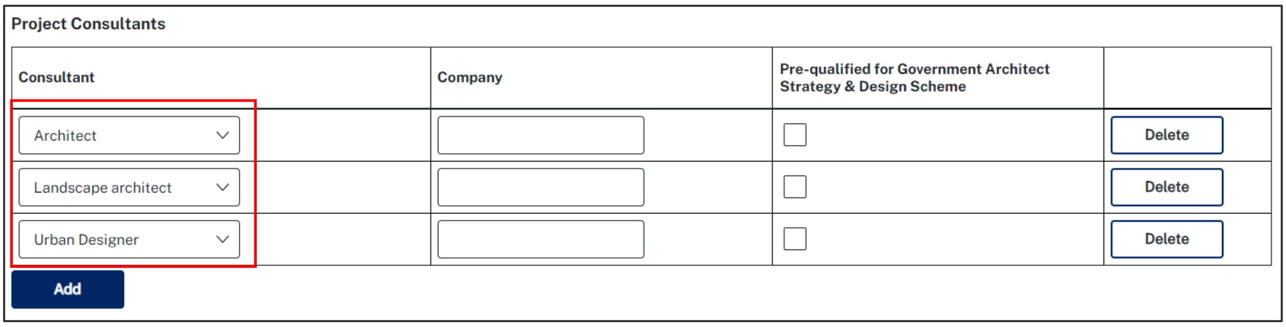
5. (Optional) If applicable, **enter** Advice received from any earlier SDRP meetings related to this application. In 1000-characters or fewer.



Project Consultants

You must include a minimum of three project consultants.

While the first three Consultant fields are pre-populated with the categories of Architect, Landscape architect and Urban Designer, these categories are not mandatory. You may select as many consultants as required.

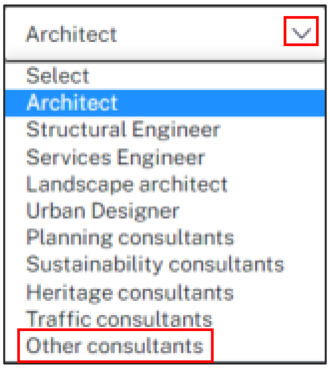


6. Retain the pre-populated consultant category, **or**

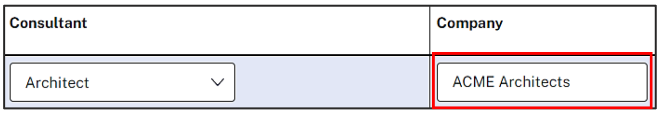
To select a consultant category other than those that are pre-populated:

Click the Consultant drop-down arrow and **select** the relevant category from the available list.

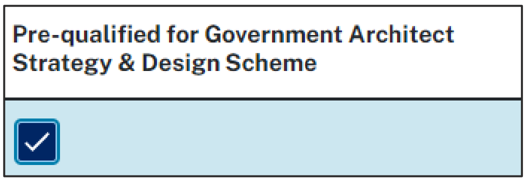
If none of the consultant categories listed are applicable, **select** Other consultants.



7. **Enter** the name of the consultant's company in the Company field.



8. **Click** the tick-box if the consultant is part of the Government Architect Strategy and Design Scheme.



Note: Only three consultant categories are eligible for inclusion in the Government Architect Strategy and Design Scheme: Architect, Landscape architect and Urban Designer.

'Pre-qualified for Government Architect' tick-boxes will display only for the three eligible categories.

9. **Repeat Step 6** to **Step 8** to add at least two more consultants.

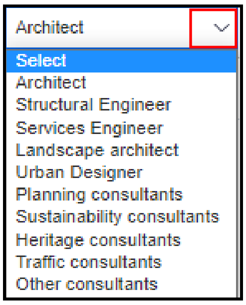
Notes:

If no further consultants are required, go to **Step 13**.

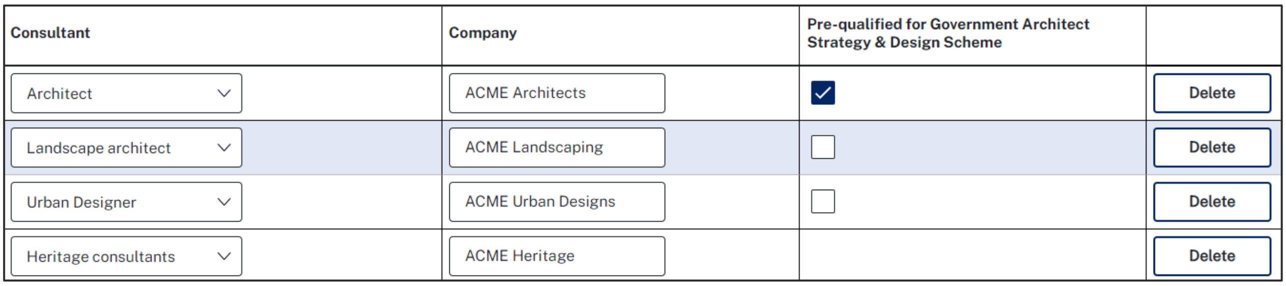
To add more consultants, continue to **Step 10**.

10. **Click** Add to add additional consultants.

11. **Click** the Consultant drop-down and **select** from the available list.



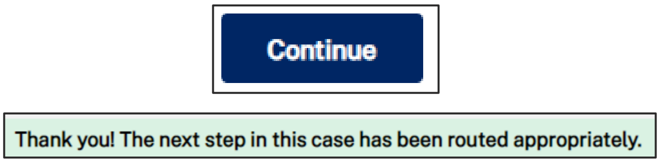
12. Enter the name of the selected consultant's company.



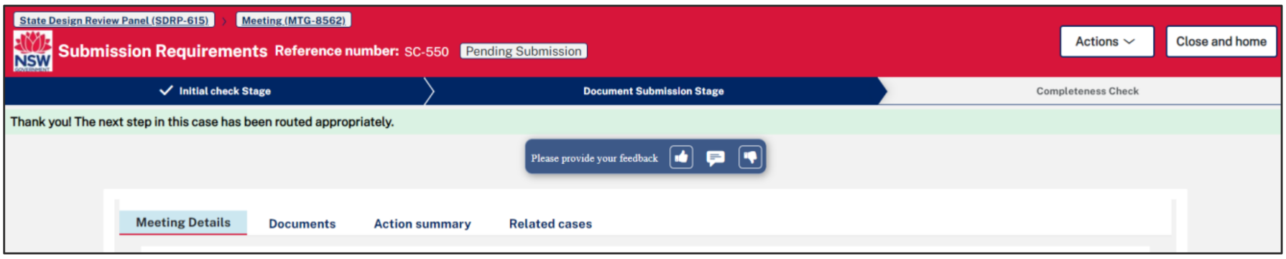
Consultant	Company	Pre-qualified for Government Architect Strategy & Design Scheme	
Architect	ACME Architects	☑	Delete
Landscape architect	ACME Landscaping	☐	Delete
Urban Designer	ACME Urban Designs	☐	Delete
Heritage consultants	ACME Heritage		Delete

Note: If required, **click** Delete to remove a consultant from the list.

13. **Click** Continue to complete this task.



A read only screen will display.



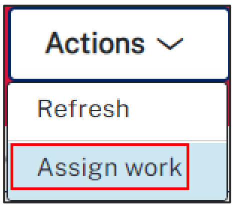
Note:

- Once the ‘Update contact details’ task is completed, the system automatically assigns the next task ‘Requirements & Uploads’ to the primary contact.
- To complete the ‘Requirements & Uploads’ task, an additional contact must assign it to themselves.

Assigning the ‘Requirements & Uploads’ task

Assign yourself the ‘Requirements & Uploads’ task via the submission requirements case (SC-XXX).

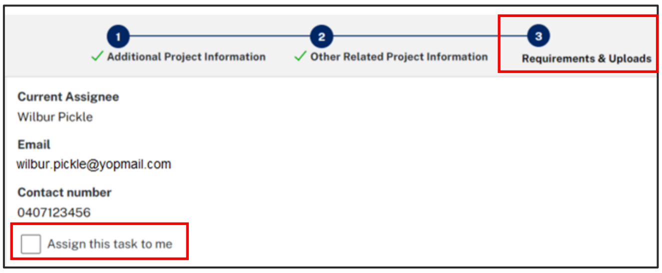
1. **Click** on the Actions drop-down and **select** Assign work.



Tip: If the Assign work option does not display in the Actions drop-down, **click** Refresh and **click** on the Actions drop-down again and it should display.

The Assign work screen displays. By default, the primary contact is the current assignee.

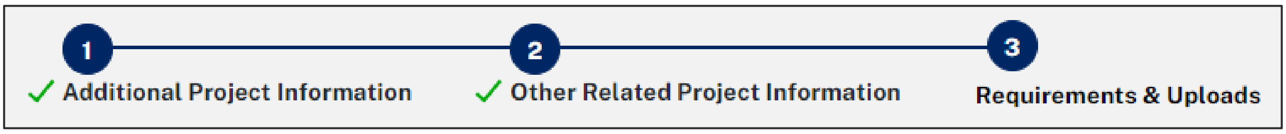
2. **Select** the ‘Assign this task to me’ tick box.

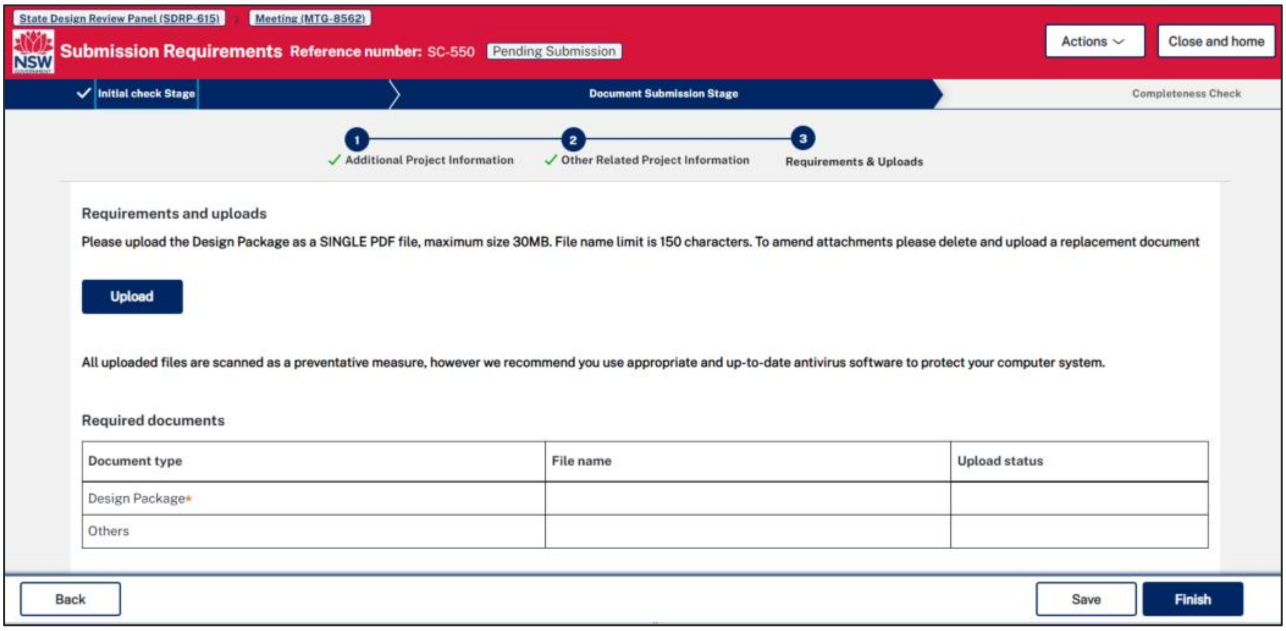


3. **Click** Finish to assign yourself the final task, ‘Requirements & Uploads’.

Requirements & Uploads

The Requirements & Uploads screen displays.





The Design Package is a required document upload.

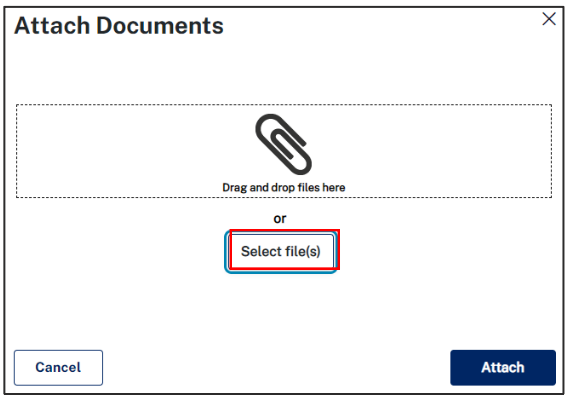
Upload the Design Package as a SINGLE PDF file, to a maximum size of 30MB.

To amend attachments, please delete the original and upload a replacement document.

4. **Click** Upload to attach the Design Package.

5. **Click** Select file(s) and navigate to the Design Package location.

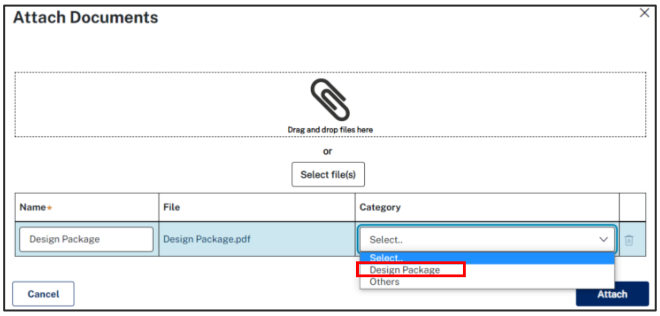
   Alternatively, you can **drag and drop** the file directly in the space provided.



6. After selecting the Design Package file to upload, **click** the Category drop-down and **select** Design Package.

Note: To upload additional document(s) repeat **Step 5** and **click** the Category drop-down to **select** Other from the list.

Additional documents will not be reviewed by the panel, only by the SDRP team. The panel will only receive the Design Package.

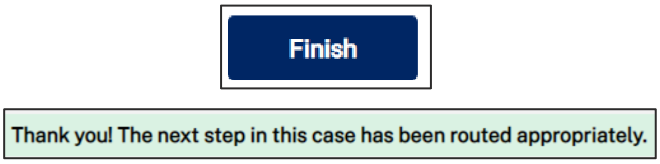


7. **Click** Attach to complete the upload.

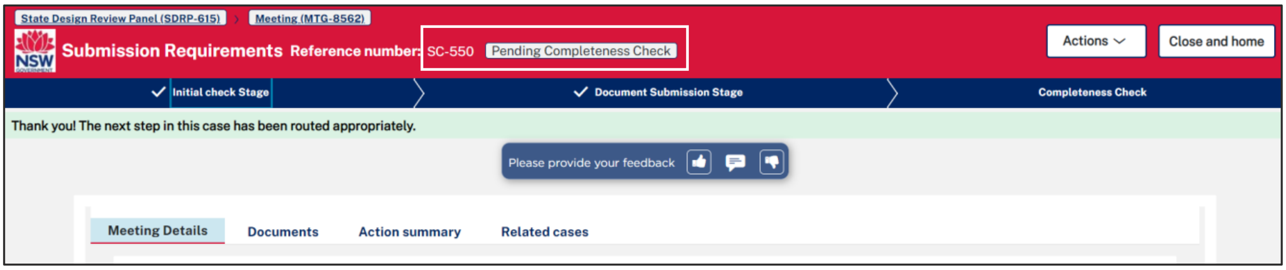
Required documents

Document type	File name	Upload status
Design Package*	Design Package.pdf	✓
Others		

8. **Click** Finish to complete the document submission.

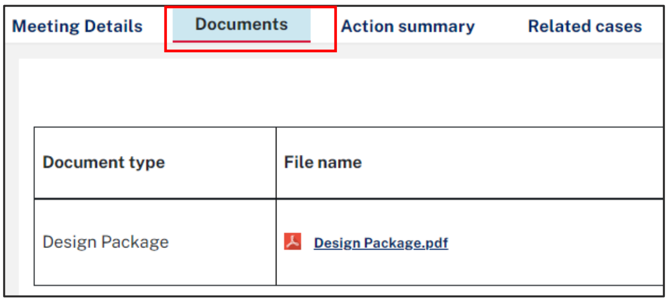


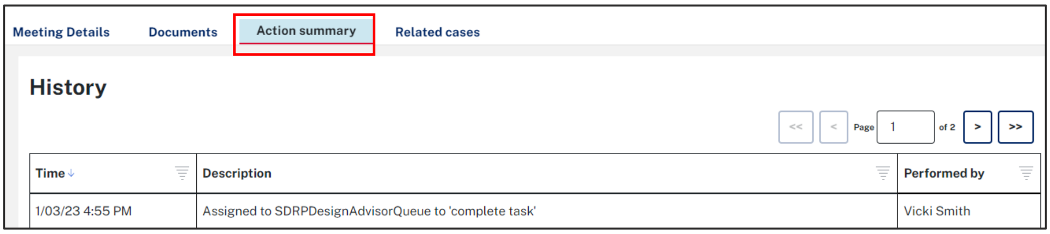
The status of the submission requirements case updates to ‘Pending Completeness Check’.

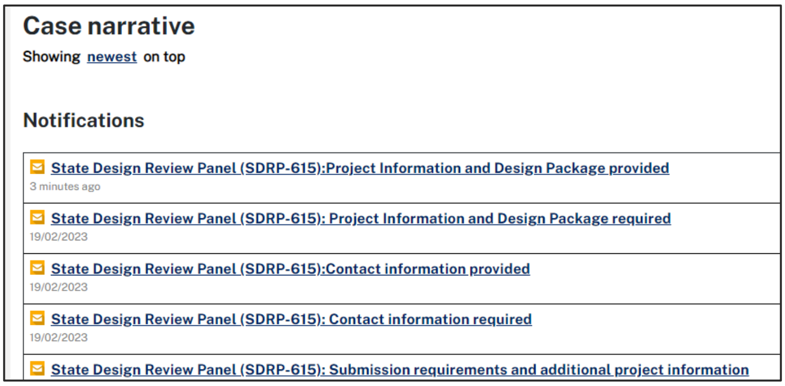


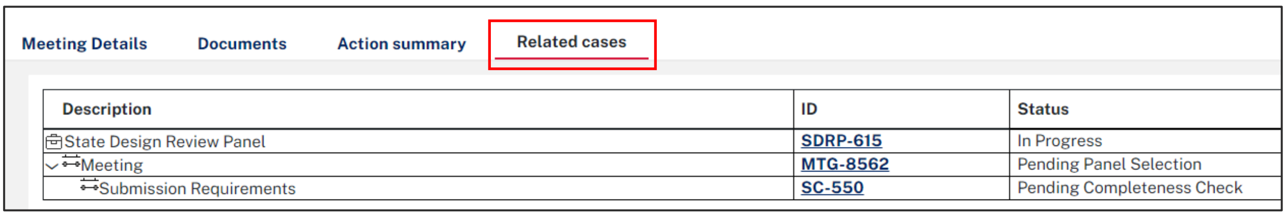
When you click Finish:

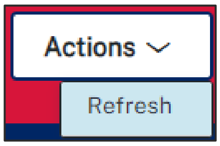
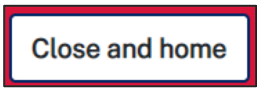
- The system sends an email notification to the SDRP design advisor/s informing them that the proponent has completed the project information and uploaded the Design Package. The email notification is located in the Action summary tab under Case narrative.
- The Documents tab includes a link to the uploaded Design Package.
- The Action summary records the date, time and who provided the proponent's contact details, project information and design package.
- The Related cases tab includes links to the SDRP application and the meeting and submission requirements child cases. By clicking on the relevant reference number link in the ID column you can open any of these cases.









Note: The only Actions option you have while the SDRP team is checking your document submission for completeness of information is Refresh.	
9. **Click** Close and home (top-right of screen) to return to your dashboard.	

What happens next?

- The SDRP design advisor will confirm whether the proponent's document submission is complete.
- If the document submission is incomplete, an email notification will be sent to the primary/additional contacts requesting the missing information. To respond to this request, log in to your Portal account and open the submission requirements case.
- Following confirmation that the proponent's submission is complete:
    a. The submission requirements case closes. The status is 'Completed'.
    b. The system generates three documents containing the proponent's information:
        i. SDRP Application Summary
        ii. SDRP Project Information
        iii. SDRP Contact Information
    c. The system-generated documents are saved in the Documents tab.
- After the submission requirements case has been closed, the primary/additional contact/s can update the client contact details and/or meeting attendees. You can make these updates up until the day **before** the panel meeting via the **completed** submission requirements case.
- The system notifies the SDRP team whenever the primary/additional contact updates the contact information/meeting attendees and generates an updated Contact Information document.
- You can find a link to an updated version of the Contact Information document in the Documents tab.
- For steps on how to update the client contact details and meeting attendees via the Portal, please refer to the reference guide, *Primary and Additional Contacts - Updating Contact Details and Meeting Attendees*.
- All meeting attendees listed in the Portal will receive a meeting agenda before the meeting. The meeting agenda is saved in the Documents tab.
- Lastly, the primary/additional contact must upload the Final Design Presentation at least one day prior to the meeting. Please upload the proponent's Final Design Presentation via the meeting child case.

- For steps on how to upload the Final Design Presentation via the Portal, please refer to the reference guide, *Primary and Additional Contacts - Uploading the Final Design Presentation.*

• Following the SDRP meeting, all meeting attendees listed will receive an email notification with the Advice letter attached. The Advice letter will be saved in the Documents tab.
End of Steps.

If you need more information

- Click the Help link at the top of the screen to access the NSW Planning Portal help pages and articles.
- Review the Frequently Asked Questions - https://www.planningportal.nsw.gov.au/help/frequently-asked-questions;
- View more quick reference guides, and support resources on our support page at https://www.planningportal.nsw.gov.au/support/how-guides; and/or
- Contact ServiceNSW on 1300 305 695 or email info@service.nsw.gov.au.