

## Update contact details and meeting attendees

This guide provides steps on how to update the client's contact details and/or meeting attendees for an SDRP meeting via the NSW Planning Portal (the Portal).

### Pre-requisites:

- The design advisor for the SDRP has confirmed the proponent's document submission is complete, and the submission requirements case has been closed.
- The SDRP meeting has not taken place.

The steps below are the same for both primary and additional contact/s.

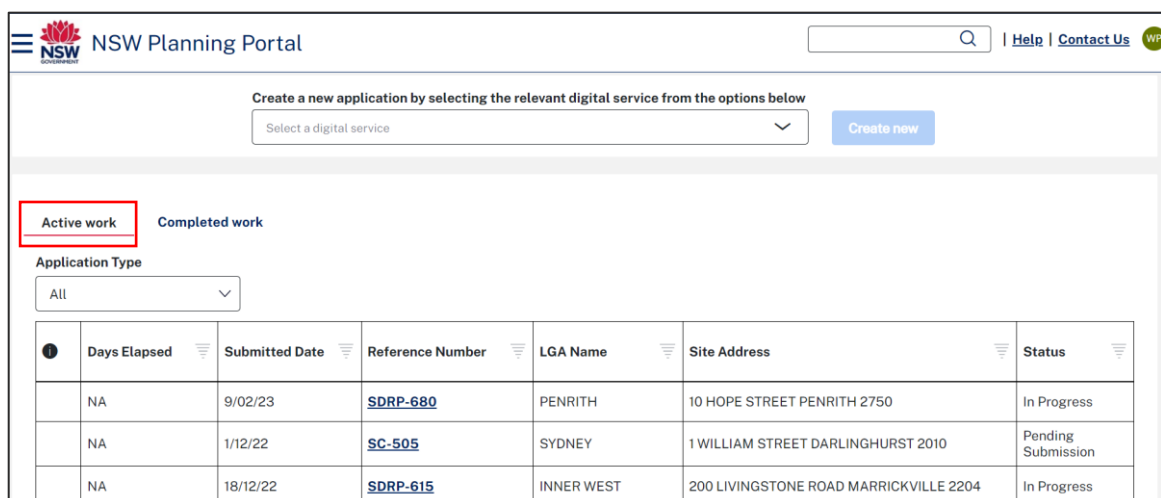
A red asterisk (\*) indicates a mandatory field or document.

## Overview

- The primary/additional contact/s may update the client's contact details/meeting attendees at any time **after** the submission requirements case has been completed and until the day **before** the panel meeting.
- Client contact details/meeting attendees can be updated as many times as required.
- The contact/meeting attendee details must be updated via the **completed** submission requirements case.
- This functionality does **not** apply to updating the proponent's primary and additional contact/s details for the SDRP application. If you need to change these contact details, please contact the SDRP team.

## Locating the completed submission requirements case

1. **Log in** to the Portal to display your Active work on the dashboard.



NSW Planning Portal

Create a new application by selecting the relevant digital service from the options below

Select a digital service

**Active work** Completed work

Application Type

All

	Days Elapsed	Submitted Date	Reference Number	LGA Name	Site Address	Status
●	NA	9/02/23	<a href="#">SDRP-680</a>	PENRITH	10 HOPE STREET PENRITH 2750	In Progress
	NA	1/12/22	<a href="#">SC-505</a>	SYDNEY	1 WILLIAM STREET DARLINGHURST 2010	Pending Submission
	NA	18/12/22	<a href="#">SDRP-615</a>	INNER WEST	200 LIVINGSTONE ROAD MARRICKVILLE 2204	In Progress

Update the client contact details/meeting attendees via the **completed** submission requirements case (SC-XXX).

2. **Click** the Completed work tab on your dashboard to display all completed work.

Active work

Completed work

Active work

Completed work

Application Type

All

Reference number	Submitted Date	LGA Name	Site address	Status	Days Elapsed
<a href="#">SC-491</a>	30/11/22	STRATHFIELD	116 ALBERT ROAD STRATHFIELD 2135	Complete	
<a href="#">SC-549</a>	9/02/23	PENRITH	10 HOPE STREET PENRITH 2750	Complete	
<a href="#">SDRP-598</a>	2/12/22	BURWOOD	95 QUEEN STREET CROYDON 2132	Withdrawn	NA

3. **Click** on the SC reference number to open the completed submission requirements case.

**Note:** The status is 'Complete'.

[SC-549](#)

If you cannot easily find the completed submission requirements case, you can search for it 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 completed 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.

SC-549




SDRP-680



NSW Planning Portal

SDRP-680



Case

Complying Development Certificate

Include

Work items only

Show

All work

Last Updated

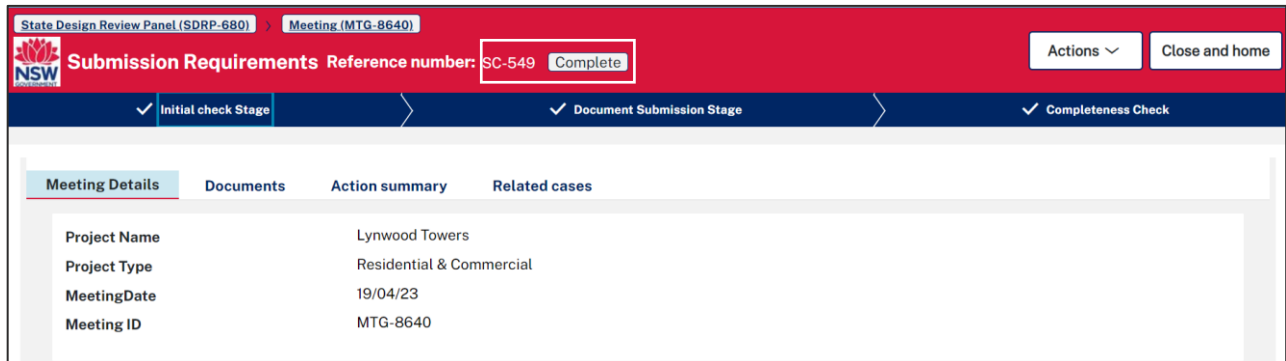
Anytime

[Show results in a new window](#)

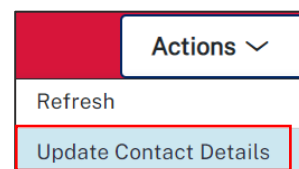
Case type	Description	ID	Status	Updated
	Submission Requirements	SC-549	Complete	13/02/23
	Meeting	MTG-8640	Pending Meeting	14/02/23
	State Design Review Panel	SDRP-680	In Progress	10/02/23

## Updating contact details

The completed submission requirements case opens. The status is 'Complete'.



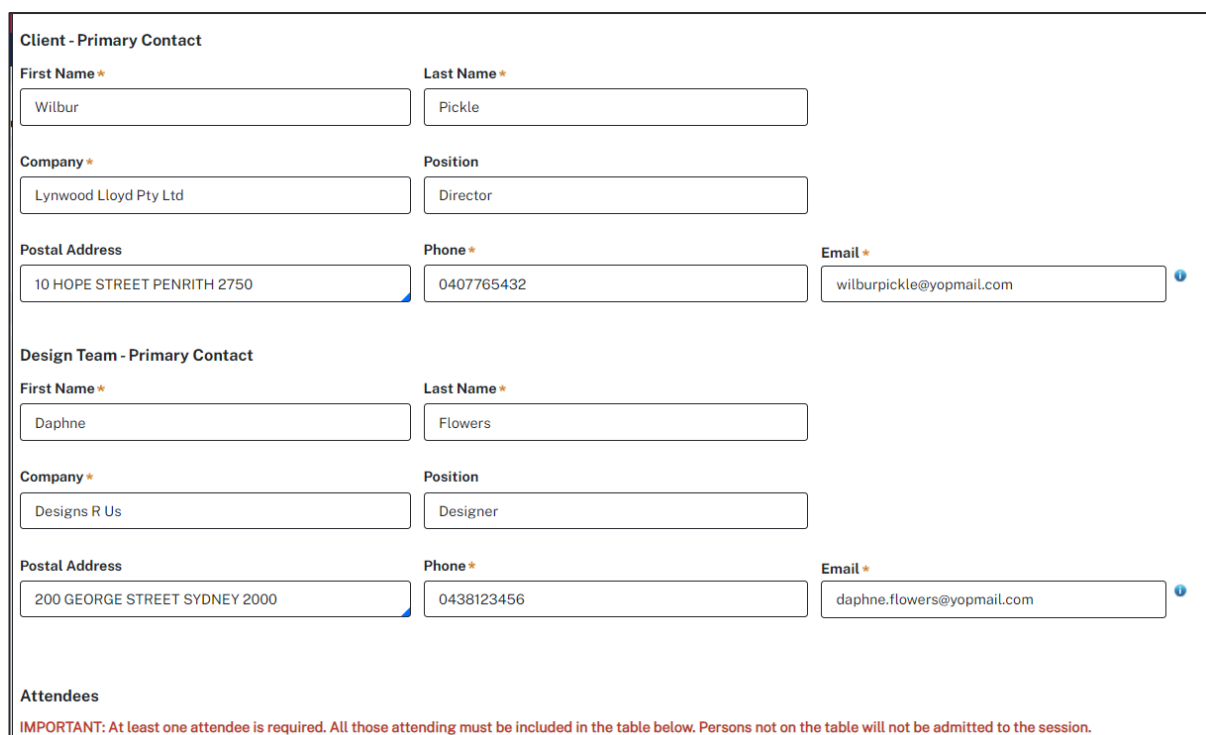
4. Click the Actions menu and select Update Contact Details.



The contact details and meeting attendees screen displays.

The screen displays details entered by the primary/additional contact while completing the submission requirements, as well as any updates.

The primary/additional contact/s can update all fields as needed.



### Update 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).

5. If required, **update** the contact details for the Client-Primary Contact.

Client - Primary Contact		
First Name *	Last Name *	
<input type="text" value="Wilbur"/>	<input type="text" value="Pickle"/>	
Company *	Position	
<input type="text" value="Lynwood Lloyd Pty Ltd"/>	<input type="text" value="Director"/>	
Postal Address	Phone *	Email *
<input type="text" value="10 HOPE STREET PENRITH 2750"/>	<input type="text" value="0407765432"/>	<input type="text" value="wilburpickle@yopmail.com"/>

### Update Design Team – Primary Contact

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

6. If required, **update** the contact details for the Design Team - Primary contact.  
If no further updates are needed, go to **Step 15**.

Design Team - Primary Contact		
First Name *	Last Name *	
<input type="text" value="Daphne"/>	<input type="text" value="Flowers"/>	
Company *	Position	
<input type="text" value="Designs R Us"/>	<input type="text" value="Designer"/>	
Postal Address	Phone *	Email *
<input type="text" value="200 GEORGE STREET SYDNEY 2000"/>	<input type="text" value="0438123456"/>	<input type="text" value="daphne.flowers@yopmail.com"/>

## Updating meeting attendees

In this section, you can update existing attendees and/or add/remove 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.

<b>Attendees</b>					
<b>IMPORTANT: At least one attendee is required. All those attending must be included in the table below. Persons not on the table will not be admitted to the session.</b>					
<b>Add</b>					
Name *	Position *	Company Name *	Email *	Telephone *	
<input type="text" value="Wilbur Pickle"/>	<input type="text" value="Director"/>	<input type="text" value="Lynwood Lloyd Pty Ltd"/>	<input type="text" value="wilburpickle@yopmail.c"/>	<input type="text" value="0407765432"/>	<b>Delete</b>
Name *	Position *	Company Name *	Email *	Telephone *	
<input type="text" value="Daphne Flowers"/>	<input type="text" value="Designer"/>	<input type="text" value="Designs R Us"/>	<input type="text" value="daphne.flowers@yopma"/>	<input type="text" value="0438123456"/>	<b>Delete</b>

7. If required, **update** existing contact details for the listed attendee/s.

Name *	Position *	Company Name *	Email *	Telephone *
<input type="text" value="Wilbur Pickle"/>	<input type="text" value="Director"/>	<input type="text" value="Lynwood Lloyd Pty Ltd"/>	<input type="text" value="wilburpickle@yopmail.co"/>	<input type="text" value="0407765432"/>

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

<b>Add</b>
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Name *	Position *	Company Name *	Email *	Telephone *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

9. <b>Enter</b> the attendee's full Name.	<input type="text" value="Name *"/>
10. <b>Enter</b> the attendee's Position.	<input type="text" value="Position *"/>
11. <b>Enter</b> the attendee's Company Name.	<input type="text" value="Company Name *"/>
12. <b>Enter</b> the attendee's Email address.	<input type="text" value="Email *"/>
13. <b>Enter</b> the attendee's Telephone number. <b>Note:</b> The telephone number should be at least 10 characters long.	<input type="text" value="Telephone *"/>
14. To add additional attendees, <b>click</b> Add and repeat <b>steps 9 to 13</b> .	<input type="button" value="Add"/>
<b>Note:</b> If required, <b>click</b> Delete to remove an attendee from the list.	<input type="button" value="Delete"/>
15. <b>Click</b> Submit to complete the update.	<input type="button" value="Submit"/>

**Note:** If you click Submit without updating this screen, an error message will display, and the system will not allow you to continue. You will need to click Cancel or Close and home to return to your dashboard.

There were no updates to the Contacts/Attendees , please click Cancel/Close and home

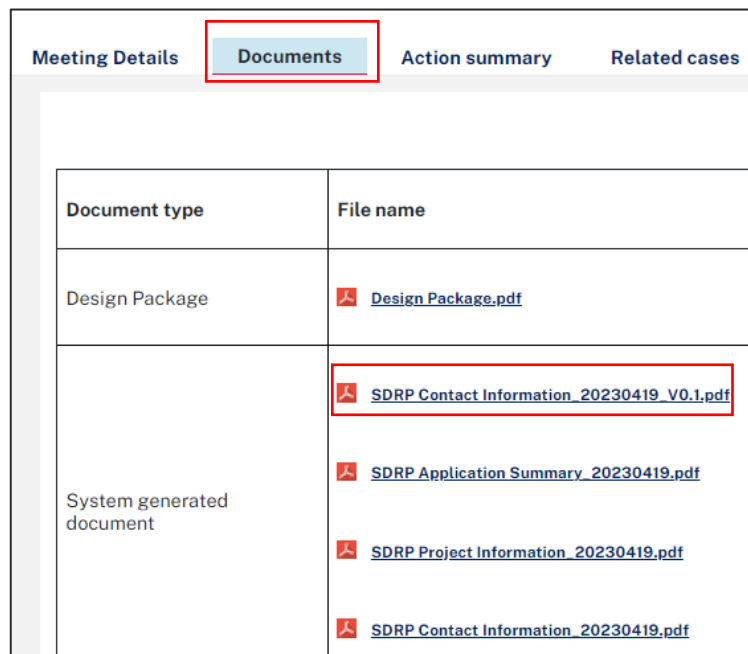
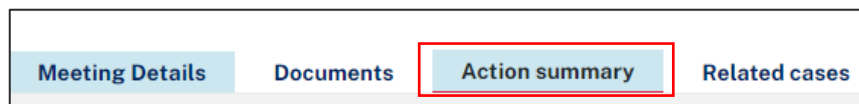
**Client - Primary Contact**

**First Name \***






**Last Name \***

When you click Submit:

- The system sends an email notification to the SDRP team advising them that the contact information has been provided – completed or updated. The email notification is located under Case narrative in the Action summary tab.
- The system generates an updated SDRP Contact Information document, which is located in the Documents tab.
- The Action summary records the date, time and who updated the contact details/meeting attendees.



The screenshot shows the 'Documents' tab selected in the navigation bar. Below the navigation bar is a table with two columns: 'Document type' and 'File name'.

Document type	File name
Design Package	 <a href="#">Design Package.pdf</a>
System generated document	 <a href="#">SDRP Contact Information_20230419_V0.1.pdf</a>
	 <a href="#">SDRP Application Summary_20230419.pdf</a>
	 <a href="#">SDRP Project Information_20230419.pdf</a>
	 <a href="#">SDRP Contact Information_20230419.pdf</a>

16. **Click** Close and Home to return to Active work on your dashboard.




The 'Close and home' button is highlighted with a red rectangular box.

End of Steps.

## What happens next?

- Whenever the client's contact details or meeting attendees are updated, the system will generate an updated SDRP Contact Information document.
- From the day of the panel meeting onwards, the primary contact/additional contact/s will no longer be able to update the contact/meeting attendee details.
- An SDRP team member can update the client contact details/meeting attendees on behalf of the proponent from the day of the panel meeting onwards and while the meeting case is active.

The below sample displays the SDRP Contact Information pdf. The document includes all contact information, and the highlighted portion at the bottom shows the contact information that is updated during this process.

**SDRP Contact Information**

Portal Application number: SDRP-680  
Meeting Date: 19/04/2023

Proponent Details

**Primary Contact**

First Name	Wilbur
Last Name	Pickle
Company	Lynwood Lloyd Pty Ltd
Position	Director
Postal Address	10 Hope Street
Phone	0407123456
Email	sarahapplicant@yopmail.com

**Additional Contact 1**

First Name	Daphne
Last Name	Flowers
Email	vicki.applicant@yopmail.com

**Additional Contact 2**

First Name	
Last Name	
Email	

Contact Information

**Client-Primary Contact**

First Name	Wilbur
Last Name	Pickle
Company	Lynwood Lloyd Pty Ltd
Position	Director
Postal Address	10 HOPE STREET PENRITH 2750
Phone	0407765432
Email	wilburpickle@yopmail.com

**Design Team-Primary Contact**

First Name	Daphne
Last Name	Flowers
Company	Designs R Us
Position	Designer
Postal Address	200 GEORGE STREET SYDNEY 2000
Phone	0438123456
Email	daphne.flowers@yopmail.com

**Attendees**

Name	Company	Email	Telephone
Wilbur Pickle	Lynwood Lloyd Pty Ltd	wilburpickle@yopmail.com	0407765432
Daphne Flowers	Designs R Us	daphne.flowers@yopmail.com	0438123456
George Grub	Lynwood Lloyd Pty Ltd	georgegrub@yopmail.com	0414786345

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## 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](mailto:info@service.nsw.gov.au).