

How to manage consent authority required documents

Councils and consent authorities can configure documents required to be submitted by applicants at the time of making their **development application** , in addition to the documents required in the Secretary’s approved form. Required documents can be configured based on development type and development category.

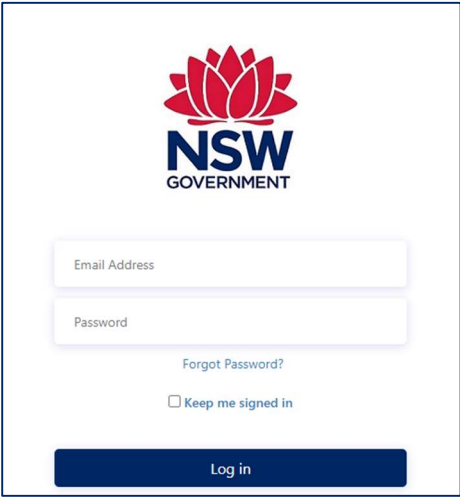
The document management feature is available only to those who have organisation administration access in the NSW Planning Portal.

Configure your organisation profile	1
Add consent authority required documents.....	4
Update the effective date for a consent authority required document	6
Delete a consent authority required document.....	7
What happens next?	8
More information.....	9

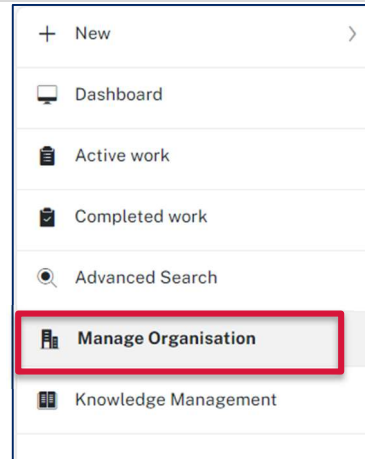
Configure your organisation profile

Note: This step must be completed by your organisation administrator to ensure your organisation can access the document management functionality.

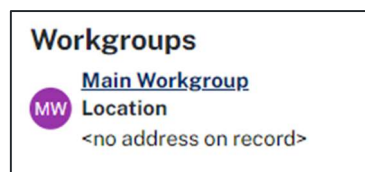
1. **Log in** to the NSW Planning Portal using the organisation administrators’ account details.



2. **Select** “Manage organisation” from the left-hand menu.



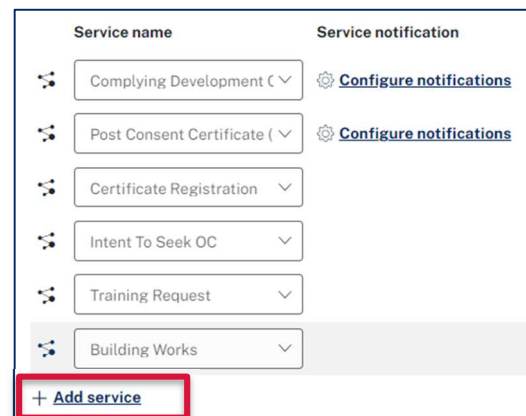
3. On the homepage for your organisation, **select** the main workgroup by clicking on the blue title.

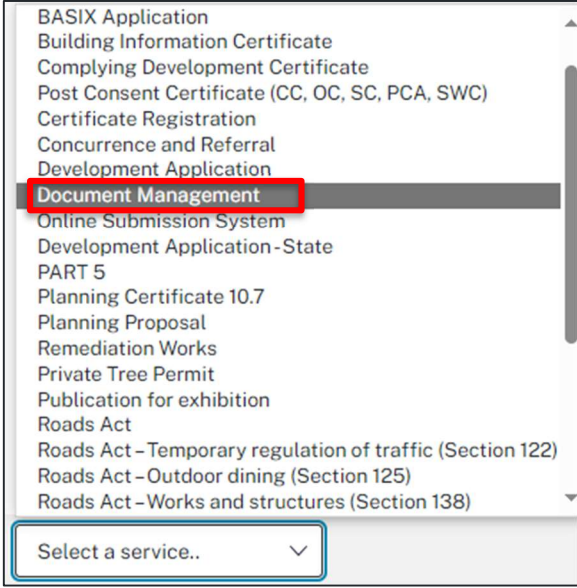
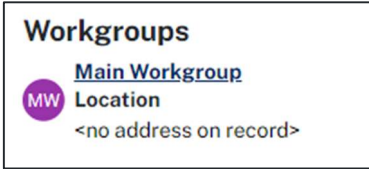
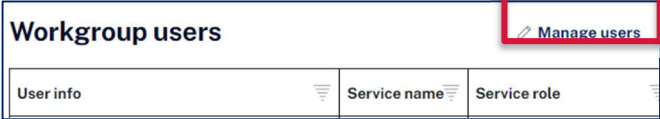
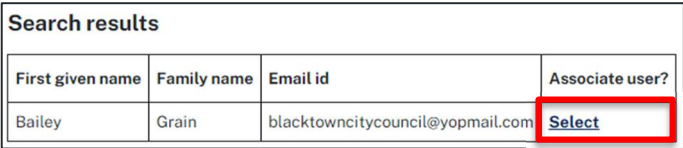


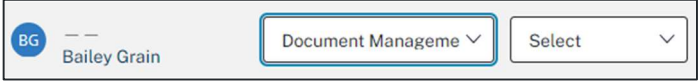
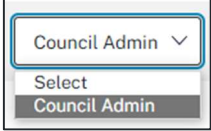
4. **Select** “Manage services” located on the right-hand side of the screen.



5. Click “Add service”. This is located under the list of services.

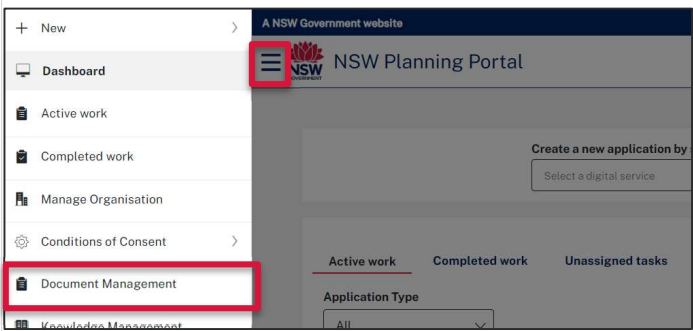


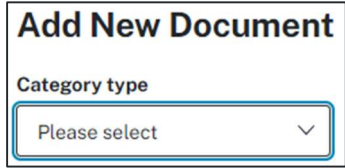
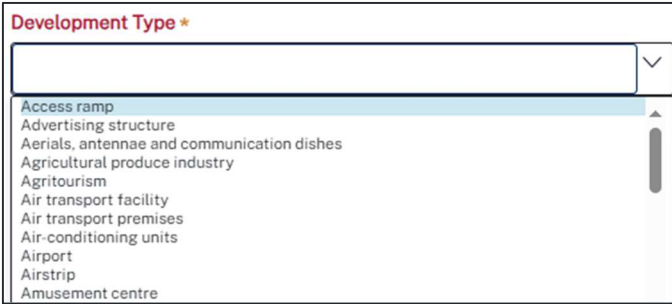
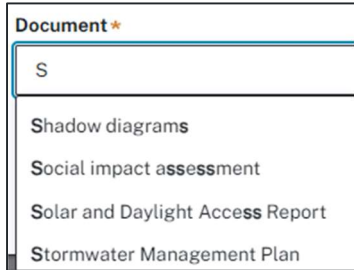
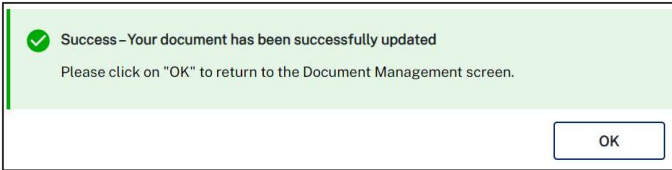
6. Select “Document management” from the drop-down list. The list will only display those services relevant to your organisation type.	
7. Click “Submit” to continue.	
8. Click “Close” in the top banner to return to your dashboard.	
You will now need to assign users to this service.	
9. On the homepage for your organisation, select the relevant workgroup by clicking on the blue title.	
10. Select “Manage users”. A table will display with all users currently assigned to that workgroup.	
11. Scroll to the bottom of the table and click “Add user” to open the search screen.	
12. Enter the user email address in full and click “Search” to locate the user. <u>Note:</u> The user must have registered for a NSW Planning Portal account to be assigned to a workgroup.	
13. Click “Select” to add the user to the workgroup. <u>Note:</u> The text in the “Associate user?” column will change to “Selected”.	

14. Click submit to continue.	
15. Select "Document management" from the drop-down list.	
16. Select the service role from the drop-down list. Repeat steps 11 to 16 until all relevant users have been added to this service.	
17. Click "Submit" to continue.	
18. Click "Close" in the top banner to return to your dashboard.	

Add consent authority required documents

Once your organisation profile has been updated, you can configure the consent authority required documents. Note: This functionality is only available to those users assigned to the service.

1. Open the main menu and select document management.	
2. Select "Add new document".	
<u>Note:</u> Required documents can be configured for individual development types or against a group of development types classed under a category. You may configure the same document for multiple development types at a time.	

3. To configure a document type for multiple development types, select a category. <u>Note:</u> This will populate all development types within the category in the development type window. To remove development types, click on the cross beside the development type name.	
Alternatively, to apply the document type to one development type, search or select an entry from the drop-down list.	
<u>Note:</u> "Select all" will populate all development types available.	
4. Enter a keyword to search and select an available document type. <u>Note:</u> The document category must be selected from the available options.	
5. Select a date when the required document will take effect on the application, by clicking on the calendar icon.	
6. Click submit to save the new document.	
7. A message displays confirming success. Click OK to return to document management.	

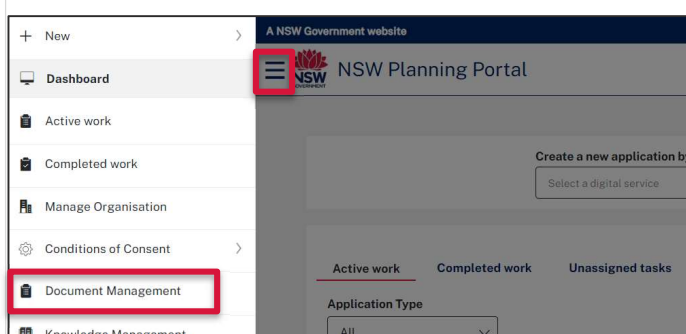
8. Click “Close” in the top banner to return to your dashboard.



Update the effective date for a consent authority required document

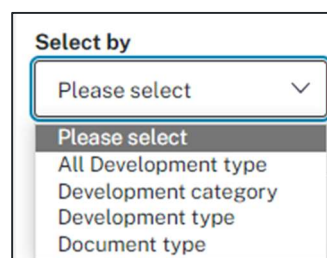
Once a consent authority document has been added, the effective date can be updated.

1. Open the main menu and select document management.



2. Locate the document by using the filters available.

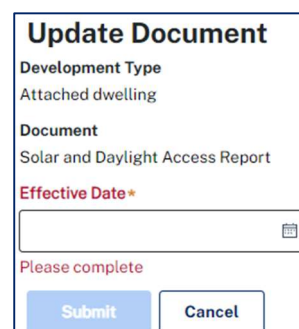
Note: Your initial selection may display additional filters.



3. Select “Update” to change the effective date for the relevant document.

Document Type	Effective Date		
Solar and Daylight Access Report	29/02/24	Update	
Solar and Daylight Access Report	28/02/24	Update	
Solar and Daylight Access Report	28/02/24	Update	

4. Select the revised effective date.



Update Document

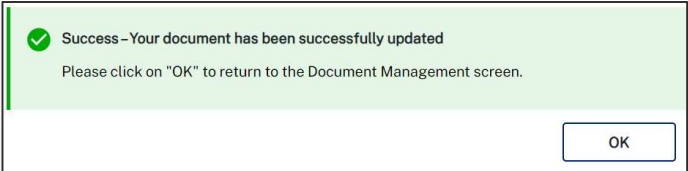
Development Type
Attached dwelling

Document
Solar and Daylight Access Report

Effective Date*

Please complete

[Submit](#) [Cancel](#)

5. Click "Submit".	
6. A message displays confirming success. Click OK to return to document management.	
7. Click "Close" in the top banner to return to your dashboard.	

Delete a consent authority required document

To delete a consent authority required document:

1. **Open** the main menu and **select** document management.

A screenshot of the NSW Planning Portal interface. On the left is a sidebar menu with options: New, Dashboard, Active work, Completed work, Manage Organisation, Conditions of Consent, Document Management (highlighted with a red box), and Knowledge Management. The main content area shows the 'NSW Planning Portal' header with the NSW Government logo, a 'Create a new application by' button, and tabs for 'Active work', 'Completed work', and 'Unassigned tasks'. Below these are filters for 'Application Type' and a dropdown menu.

2. **Locate** the document by using the filters available.

Note: Your initial selection may display additional filters.

A screenshot of a 'Select by' dropdown menu. The dropdown is open, showing a list of options: 'Please select' (with a downward arrow), 'Please select' (highlighted), 'All Development type', 'Development category', 'Development type', and 'Document type'.

3. **Select** the trash icon at the end of the relevant row to delete.

Document Type	Effective Date		
Solar and Daylight Access Report	29/02/24	Update	
Solar and Daylight Access Report	28/02/24	Update	
Solar and Daylight Access Report	28/02/24	Update	

4. Confirm that you want to delete the record by clicking "Submit".	Delete Document Request Do you want to delete this record? Development Type Boarding house Document Solar and Daylight Access Report Submit Cancel
5. A message displays confirming success. Click OK to return to document management.	✓ Success – Your document has been successfully deleted Please click on "OK" to return to the Document Management screen. OK

What happens next?

Once a consent authority required document has been added / updated / deleted:

- The document table within document management will be updated to show a row for each document type configured for a corresponding development type.
- The consent authority required document will be requested to be uploaded by applicants before submitting a development application for the corresponding development type/s. The document/s will appear on the requirements and upload application screen under a heading "Consent authority required documents".

Secretary's approved form required documents			
Document type		File name	Upload status
Cost estimate report*	What is this?		
Site plans*	What is this?		
Statement of environmental effects*	What is this?		
Consent authority required documents			
Document type		File name	Upload status
Acoustic & Vibration Assessment*	What is this?		
Political donations and gifts disclosure*	What is this?		
Additional documents			
Document type		File name	Upload status
A copy of the consent of the Minister for Energy			

- The configured document will only be effective from the nominated date.

More information

We have developed a range of support materials, including Quick Reference Guides for other services and Frequently Asked Questions (where applicable), to assist you when using the NSW Planning Portal digital services. You can access these via in the [Help and Resources section](#) of the NSW Planning Portal. We encourage you to scan these resources prior to contacting the NSW Planning Portal Customer Support team.

We also offer a range of training sessions on the NSW Planning Portal digital services. You can view and/or register for upcoming training on the [Information and Training sessions page](#) of the NSW Planning Portal.

If you require further assistance, please contact ServiceNSW on 1300 305 695 or [submit an enquiry online](#). If you are calling from outside Australia, please call +61 2 8894 1555.