

How to manage documents in the NSW Planning Portal

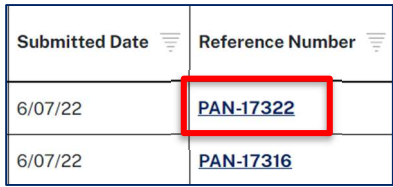
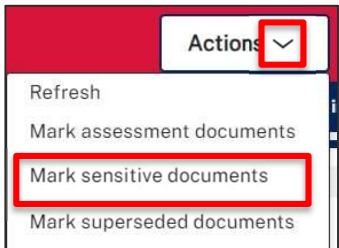
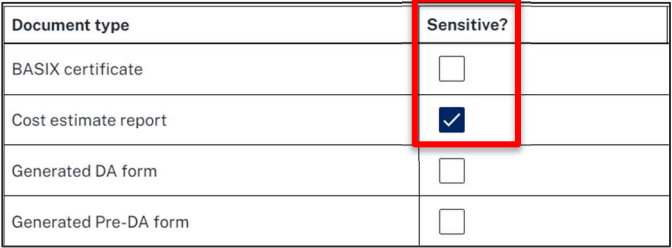
To assist with the management of documents, most digital services have an optional feature available to agencies, certifiers and councils that allows the user to mark / tag documents with the following categories:

- **Sensitive** – These documents are not visible on planningportal.nsw.gov.au or to an applicant.
- **Assessment** – These documents are to be viewed as part of the assessment process.
- **Superseded** – These documents are no longer required for an application.

Applying a tag to documents, will allow you to filter and view specific documentation in an efficient manner. You can apply multiple tags to the same document.

Mark / tag a document as sensitive

Note: If a document has been marked / tagged as sensitive, it will not be visible to the applicant or during the exhibition process but will be visible to any referral agency.

1. Log in to the NSW Planning Portal. Open the relevant application on the Active work list by clicking the reference number.	
2. To mark / tag documents as sensitive, select “Mark sensitive documents” from the Actions menu.	
3. Click the box under the “Sensitive?” column beside the relevant document/s.	

4. Click "Submit".



Submit

The relevant document/s will now have a tag "Sensitive" beside their file name in the Documents tab.

Document type	File name
BASIX certificate	☐ BASIX certificate.docx
Cost estimate report	☐ Cost estimate report.docx SENSITIVE
Generated DA form	☐ DA form_1658470777.pdf

Tip: If you need to remove a tag, complete steps 1 and 2 above, then uncheck the box under the "Sensitive?" column beside the relevant document and submit.

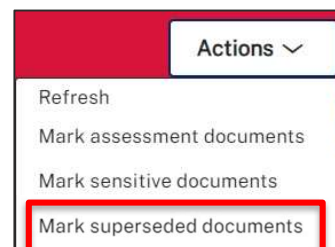
Mark / tag a document as superseded

To assist with viewing the most recent version of a document, older versions can be marked / tagged as superseded.

1. Log in to the NSW Planning Portal.

Open the relevant application on the Active work list by clicking the reference number.

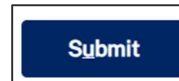
Submitted Date	Reference Number
6/07/22	PAN-17322
6/07/22	PAN-17316

2. To mark / tag documents as superseded, **select** "Mark superseded documents" from the Actions menu.

3. Click the box under the “Superseded?” column beside the relevant document/s.

Document type	Superseded?
BASIX certificate	☐
Cost estimate report	☒
Generated DA form	☐
Generated Pre-DA form	☐

4. Click “Submit”.



The relevant document/s will now have a tag “Superseded” beside their file name in the Documents tab.

Document type	File name
BASIX certificate	☐  BASIX certificate.docx
Cost estimate report	☐  Cost estimate report.docx SUPERSEDED
Generated DA form	☐  DA form_1658470777.pdf

Tip: If you need to remove a tag, complete steps 1 and 2 above, then uncheck the box under the “Superseded?” column beside the relevant document and submit.

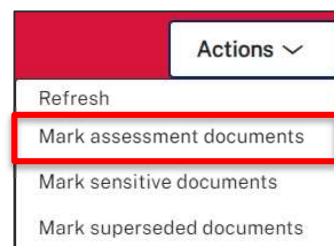
Creating an assessment set of documents

1. Log in to the NSW Planning Portal.

Open the relevant application on the Active work list by clicking the reference number.

Submitted Date	Reference Number
6/07/22	PAN-17322
6/07/22	PAN-17316

2. To mark / tag documents as part of the assessment set, **select** “Mark assessment documents” from the Actions menu.



3. Click the box under the “Assessment?” column beside the relevant document/s.

Document type	Assessment?
BASIX certificate	☒
Cost estimate report	☒
Generated DA form	☒
Generated Pre-DA form	☐
Statement of environmental effects	☒

4. Click “Submit”.



The relevant document/s will now have a tag “Assessment Set” beside their file name in the Documents tab.

Document type	File name
BASIX certificate	☐ BASIX_certificate.doc ASSESSMENT SET
Cost estimate report	☐ Cost estimate report.docx ASSESSMENT SET
Generated DA form	☐ DA form_1658470777.pdf ASSESSMENT SET

Tip: If you need to remove a tag, complete steps 1 and 2 above, then uncheck the box under the “Assessment?” column beside the relevant document and submit.

Filtering for specific documents

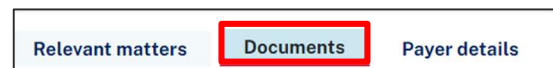
Once documents have been marked / tagged, they can be filtered.

1. Log in to the NSW Planning Portal.

Open the relevant application on the Active work list by clicking the reference number.

Submitted Date	Reference Number
6/07/22	PAN-17322
6/07/22	PAN-17316

2. Click the “Documents” tab to view the documents associated with that application.



3. You can filter the documents within the table by **selecting** one or more of the options from the drop-down.

Select document category ▼

Select document type ▼

Select uploaded by ▼

- “Document category” lists the tags that may be applied to a document e.g., Superseded
- “Document type” lists all document types applied to documents e.g., Cost estimate report
- “Uploaded by” list the users that have uploaded documents to this application e.g., applicant.

4. **Click** “Filter” once you have selected your filter/s.

The document table will refresh to display documents relevant to the filter/s applied.



To remove the filter that you have applied and view all documents, **click** “Clear filter”.



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 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.