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Referral

Summary

This guide explains the steps for referral agents to follow when responding to a referral request from the Department.
The guide assumes you are a registered user of Planning Online. If you or your organisation have not yet registered, refer to the registration guide which can be found on the Help using the Planning Online Portal page.

Referral Response

Content

1. Navigate Referral Portal Dashboard
2. Review application details
3. Referral Response
4. Uploading Supporting documents
5. Submit Responses to the Department

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Referral Portal

Referral Agent

Referral Portal Home Page

01 On the Home page, click Sign in or Register button

02 On the Home Planning Online Portal page, choose your method of signing in.

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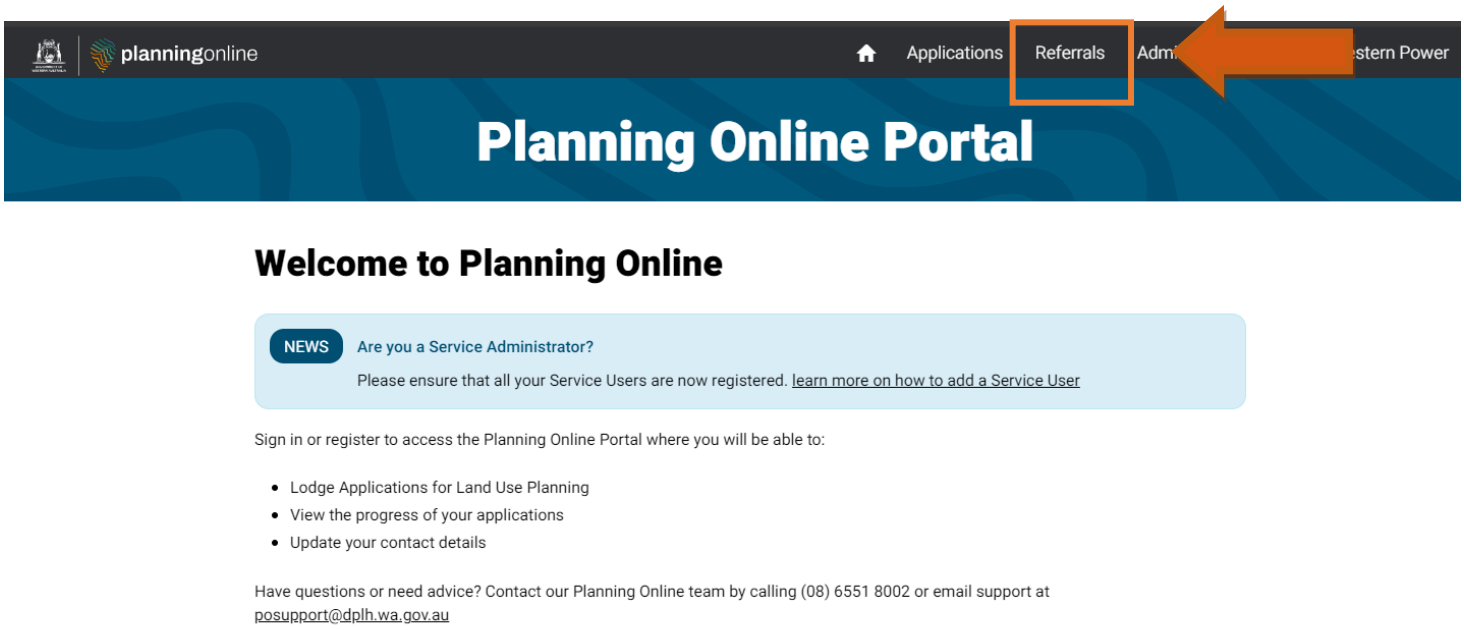
Referral Portal

Referral Agent

Planning Online Landing Page

03 Select Referrals on the ribbon to take you the Referral Portal Dashboard



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Referral Portal

Referral Agent

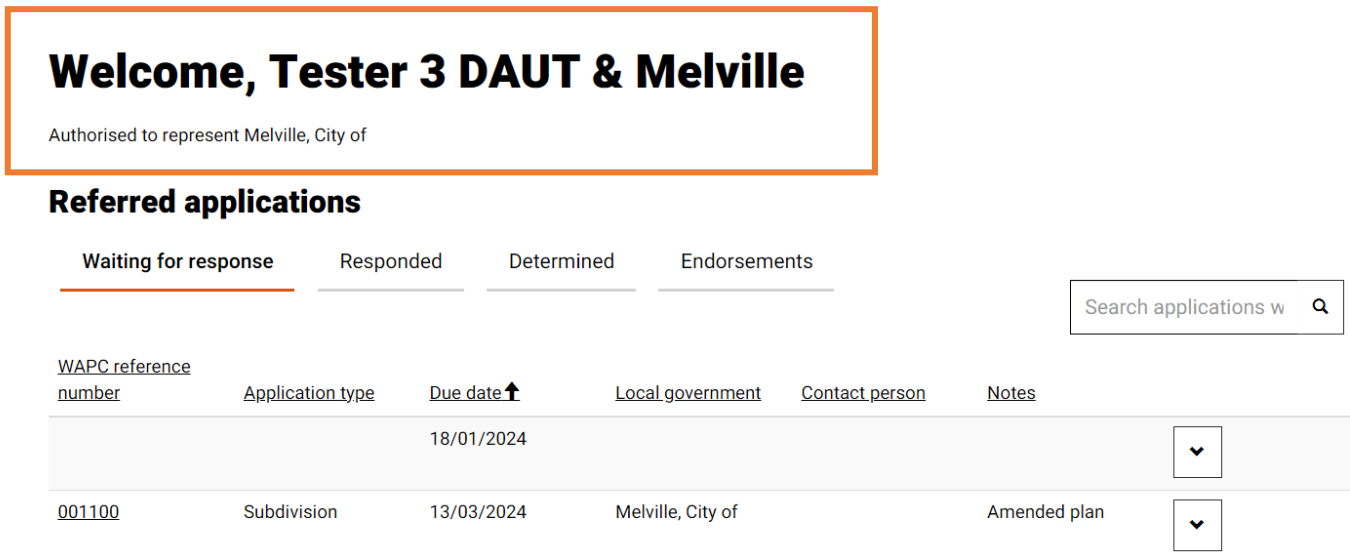
Dashboard

04

The Referral Dashboard is the place where your organisation's referral requests can be viewed and responded to.
On the dashboard the title will include your name and the organisation you represent.

The following **dashboards** are available to referral officers**.**

- Waiting for response
- Responded
- Determined, and
- Endorsements



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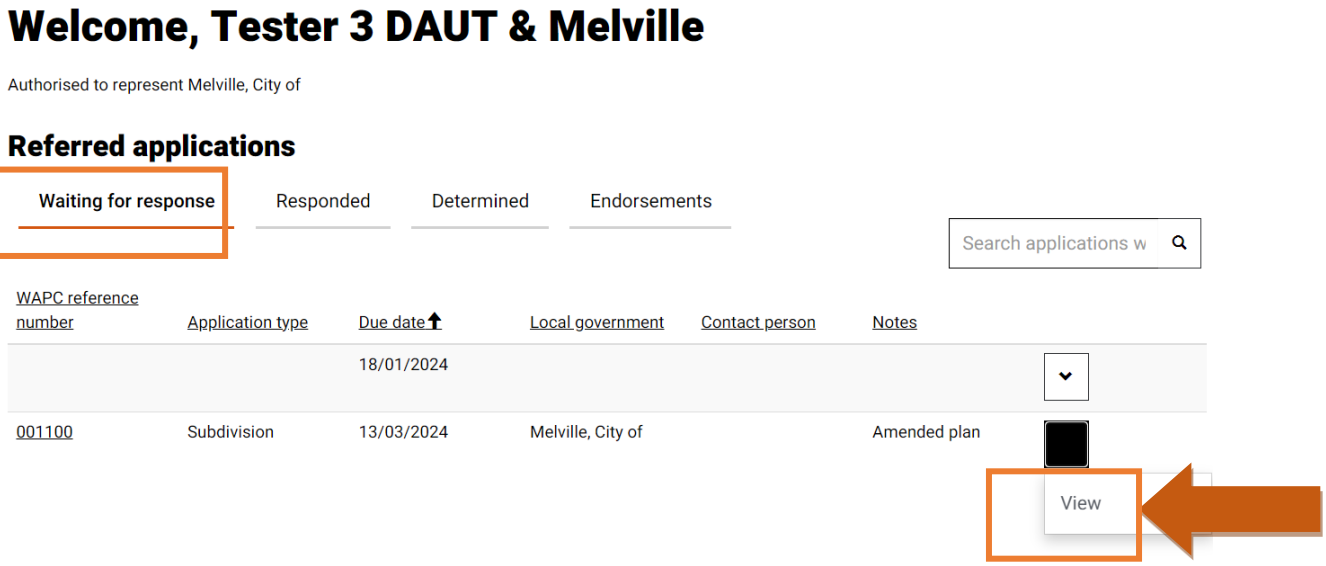
Dashboard

05

In the “Waiting for response” Dashboard go to row with the application that you want, **Click on the drop down on the far right and select “view.** This will take you to the Referral response page



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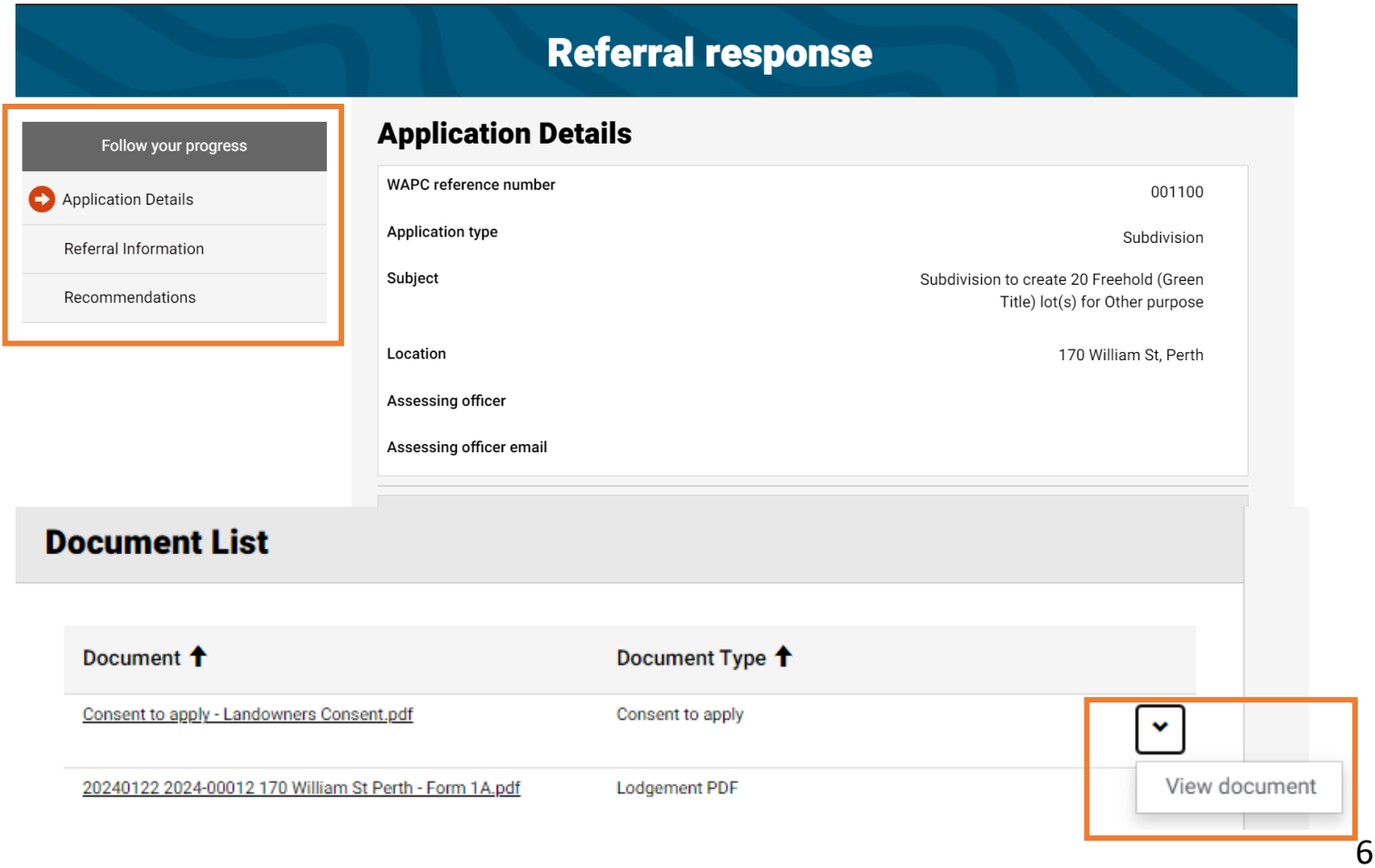
Referral Portal

Referral Agent

Response Form

06

On the Referral response page, click on the relevant tab to open **Application details**, **Referral information** or **Recommendation**. On the Application tab, **Document list** section, click on the far right drop down of the file to view the document. Click "**Next**" or go to Referral Information tab to review the provided information.



Referral Portal

Referral Agent

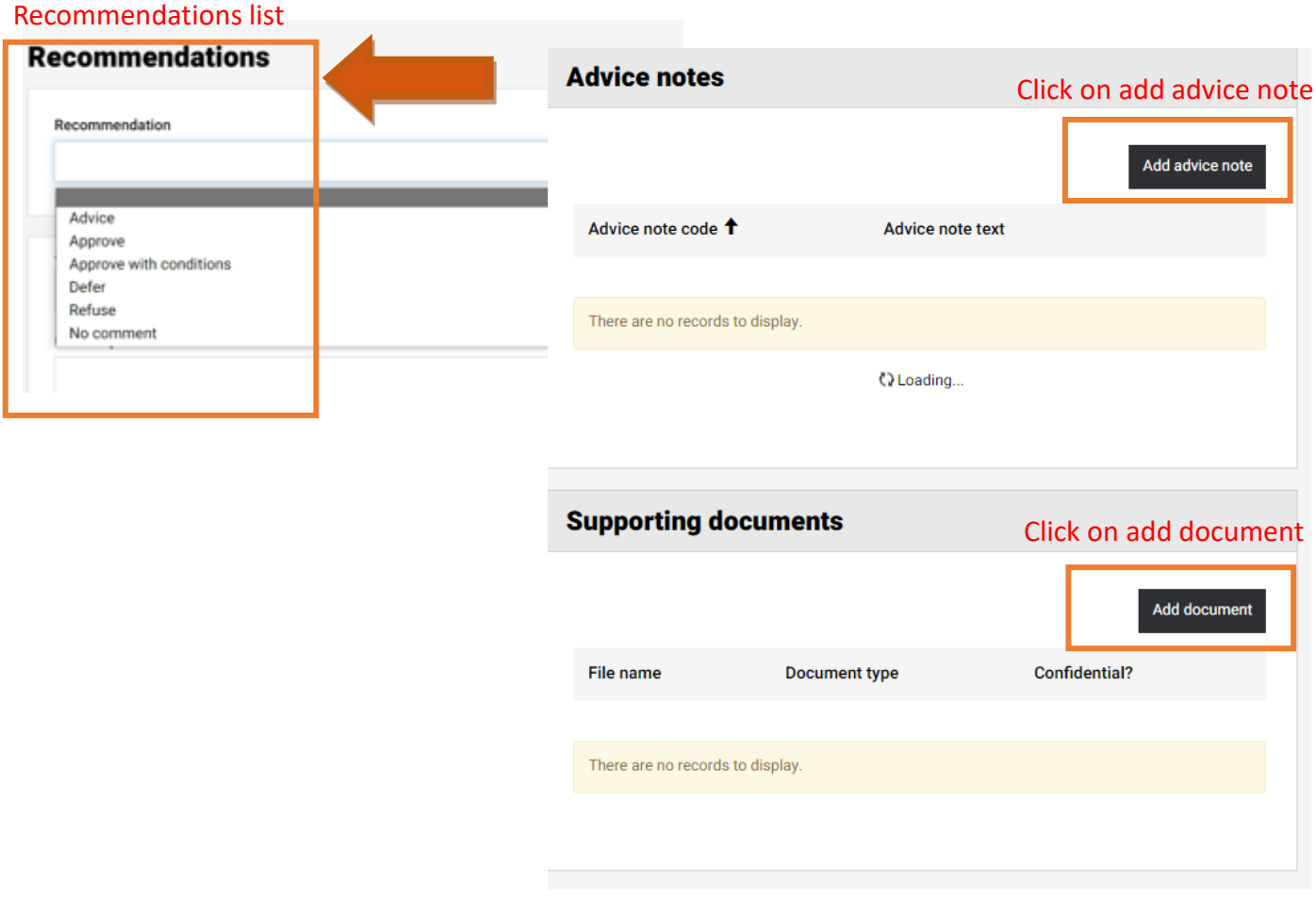
Response form - Recommendation

07

To provide a recommendation, click on the Recommendation tab and then click on Recommendation drop down. Select your chosen recommendation from the list.

- **Advice** – Click on advice to open the Advice notes page. On the advice note page add advice note by clicking on **Add advice Note.** Then **add supporting document**

Recommendations list



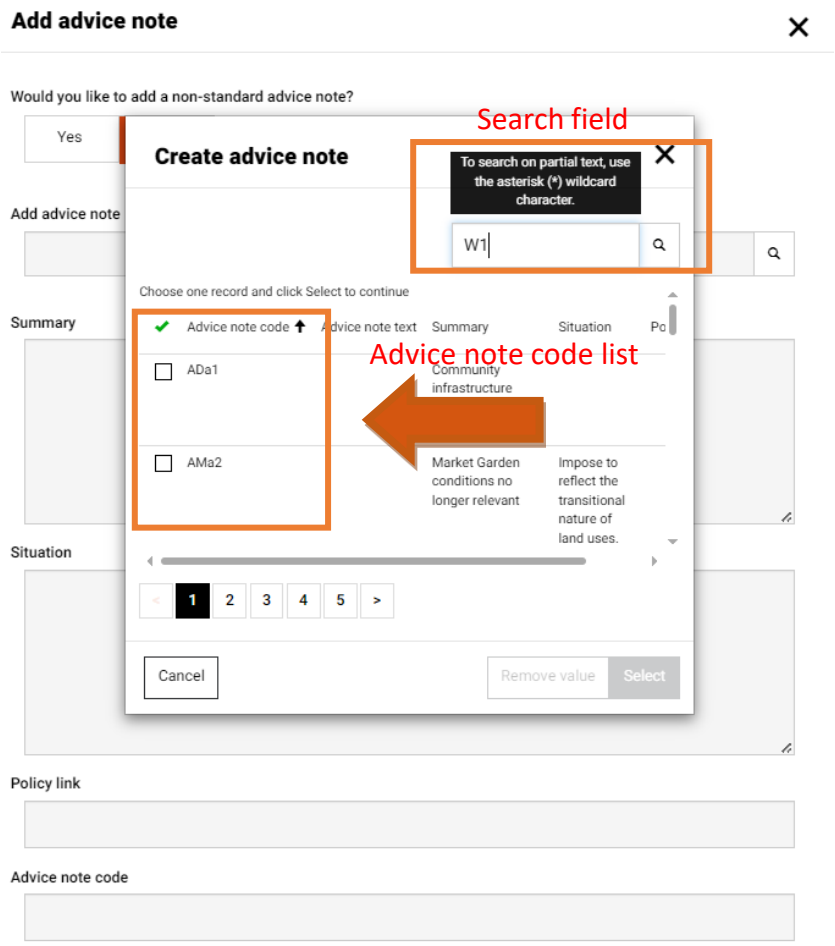
Referral Portal

Referral Agent

Response form - Recommendation

08

When you click on add Advice note**, "create advice note" drop list will appear**. If you know the advice note code enter in the search field otherwise scroll down the list to select the appropriate advice code

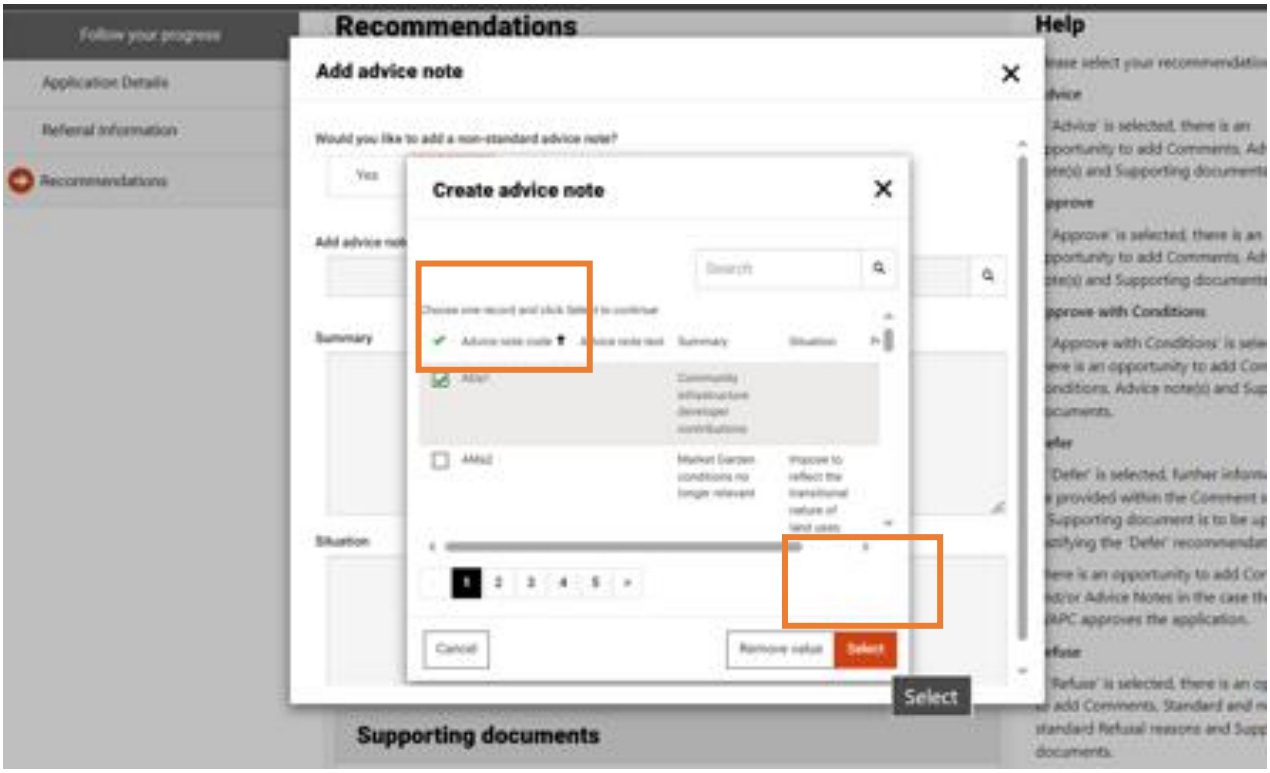


Referral Portal

Referral Agent

Response form - Recommendation

09 Select the **Advice note code** and click on **select**



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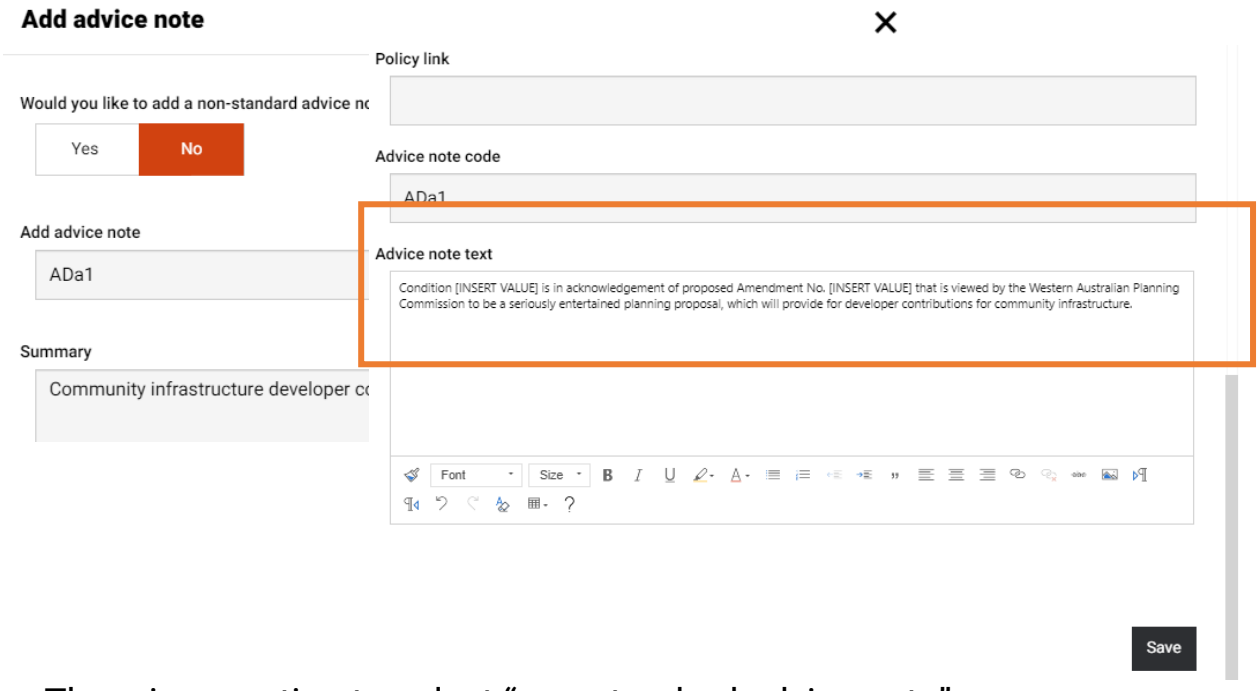
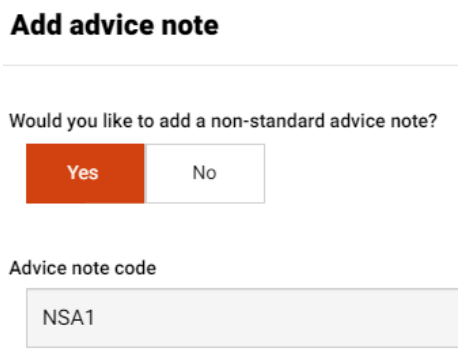
Response form - Recommendation

10 On the “add advice note” ensure that you review all the fields and edit the **Advice note text** as necessary. **Click Save**



There is an option to select “non-standard advice note”



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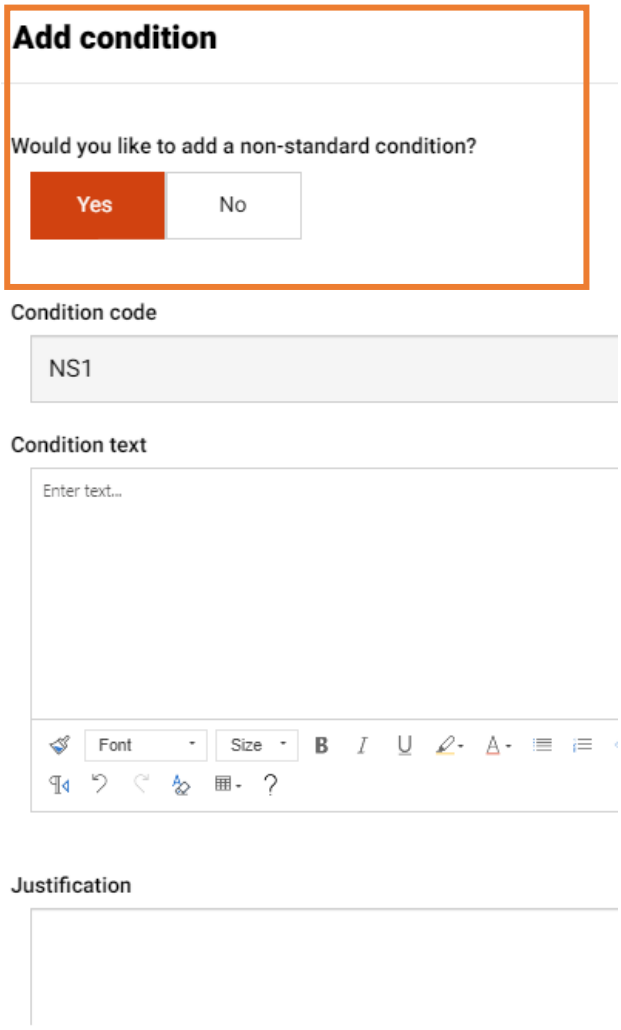
Referral Agent

Response form - Recommendation

11

If you want to **Approve with Conditions** – Click on **Add Condition** to bring up Add condition page. On this page, you can also opt to add **non-standard** conditions. Enter text as required.



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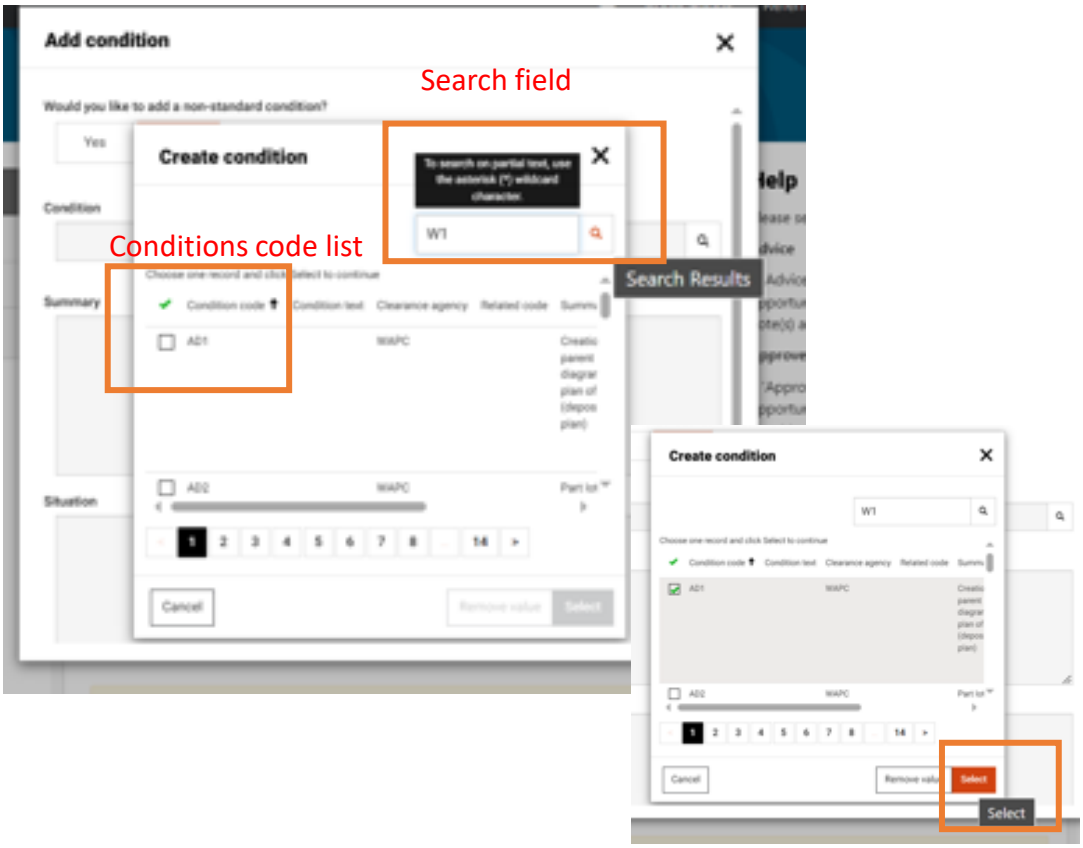
Referral Agent

Response form - Recommendation

12 To add a model condition

- Click on the magnifying glass and select from a list of conditions codes, or if you know the condition code enter on the search field and **select** the condition



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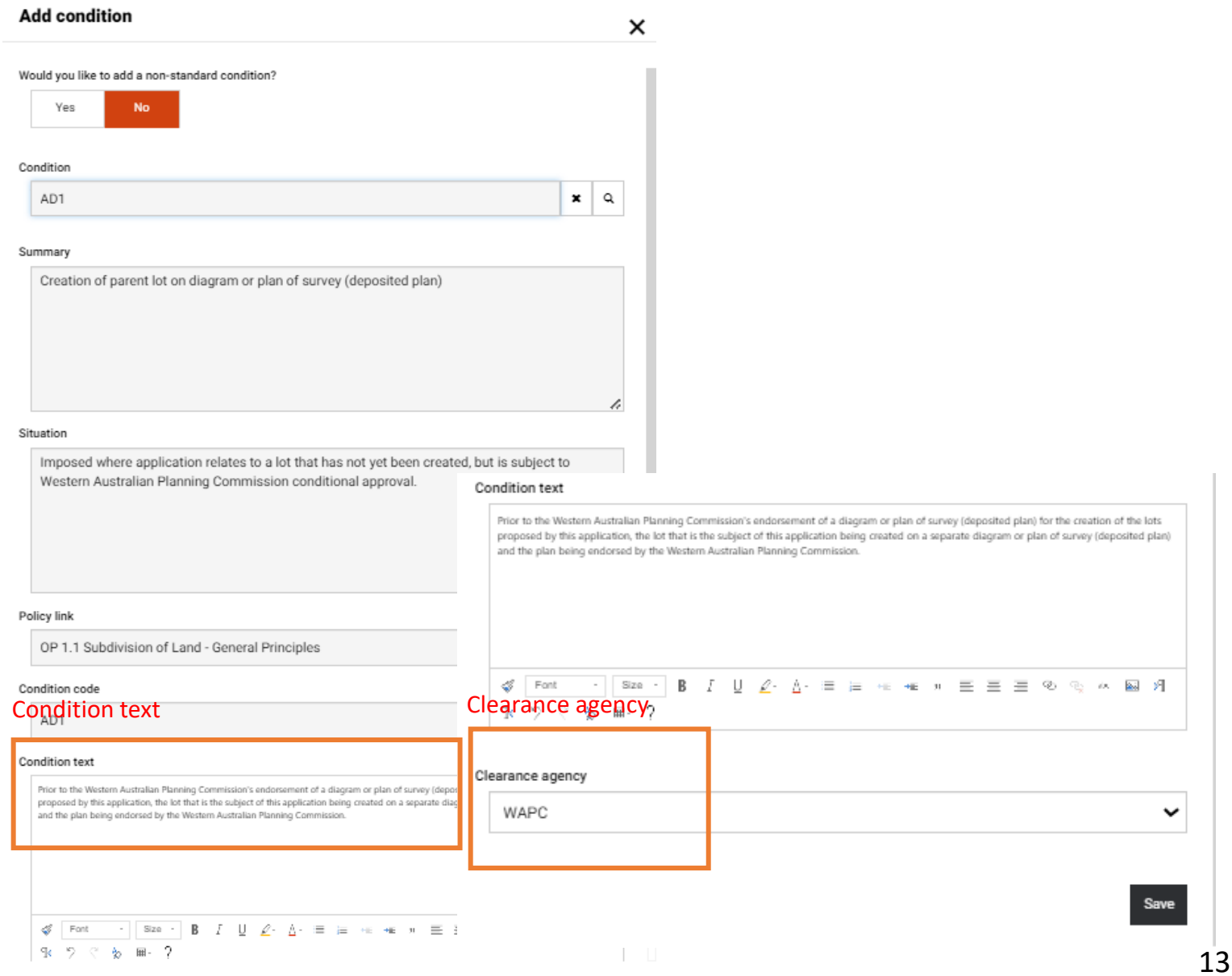
Referral Agent

Response form - Recommendation

13 Review the conditions page and edit **conditions text**. Ensure you enter the **clearance agency** and select **save**



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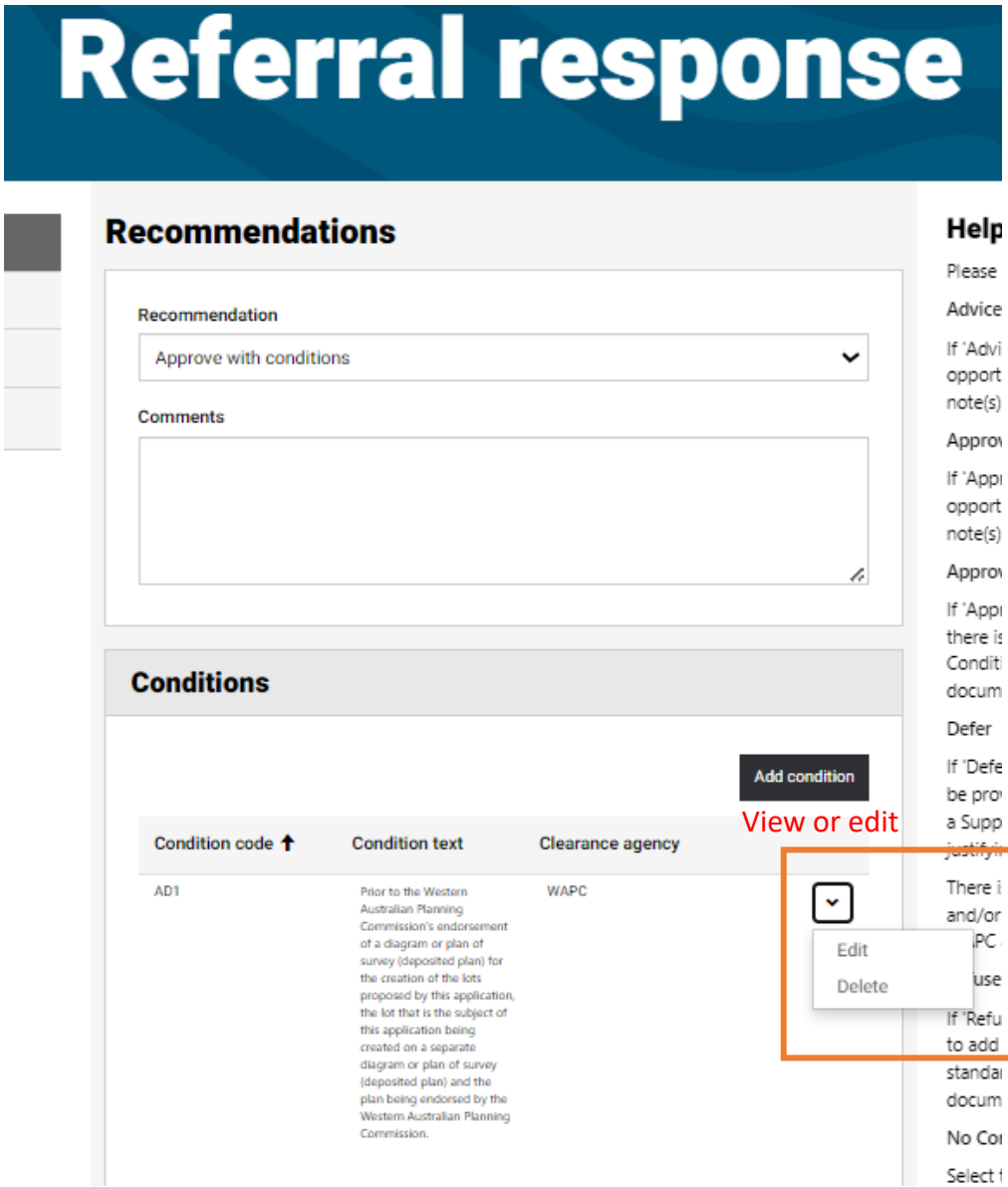
Referral Agent

Response form - Recommendation

14 You can view or edit a condition by clicking the drop down on the right side of the condition row



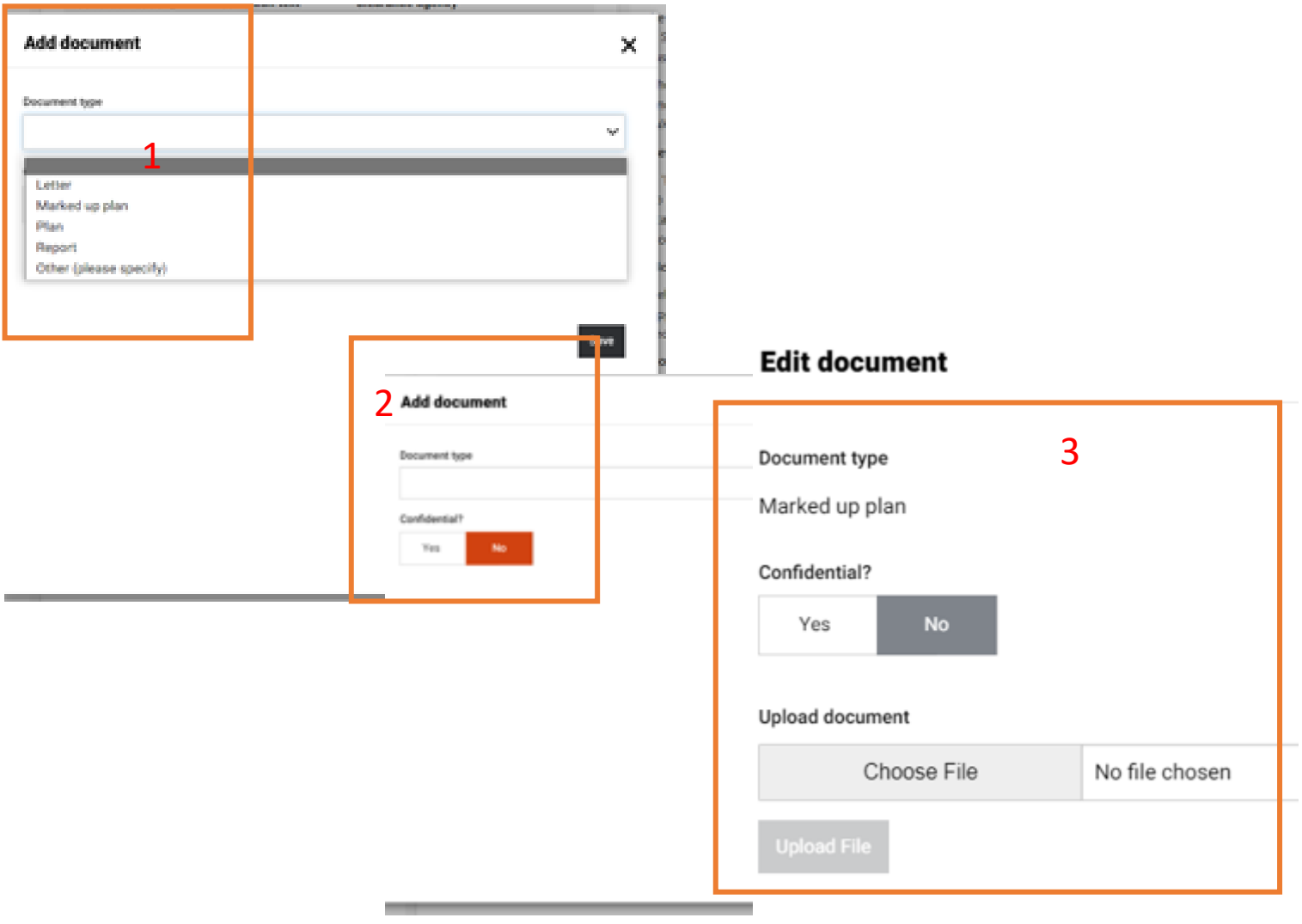
Referral Portal

Referral Agent

Response form - Recommendation

15

When you complete adding recommendations, review referral response page. You can add supporting documents by clicking on the **1- Add document.** On the Add document page select the **2- document type and save.** Then **3 upload a file.**



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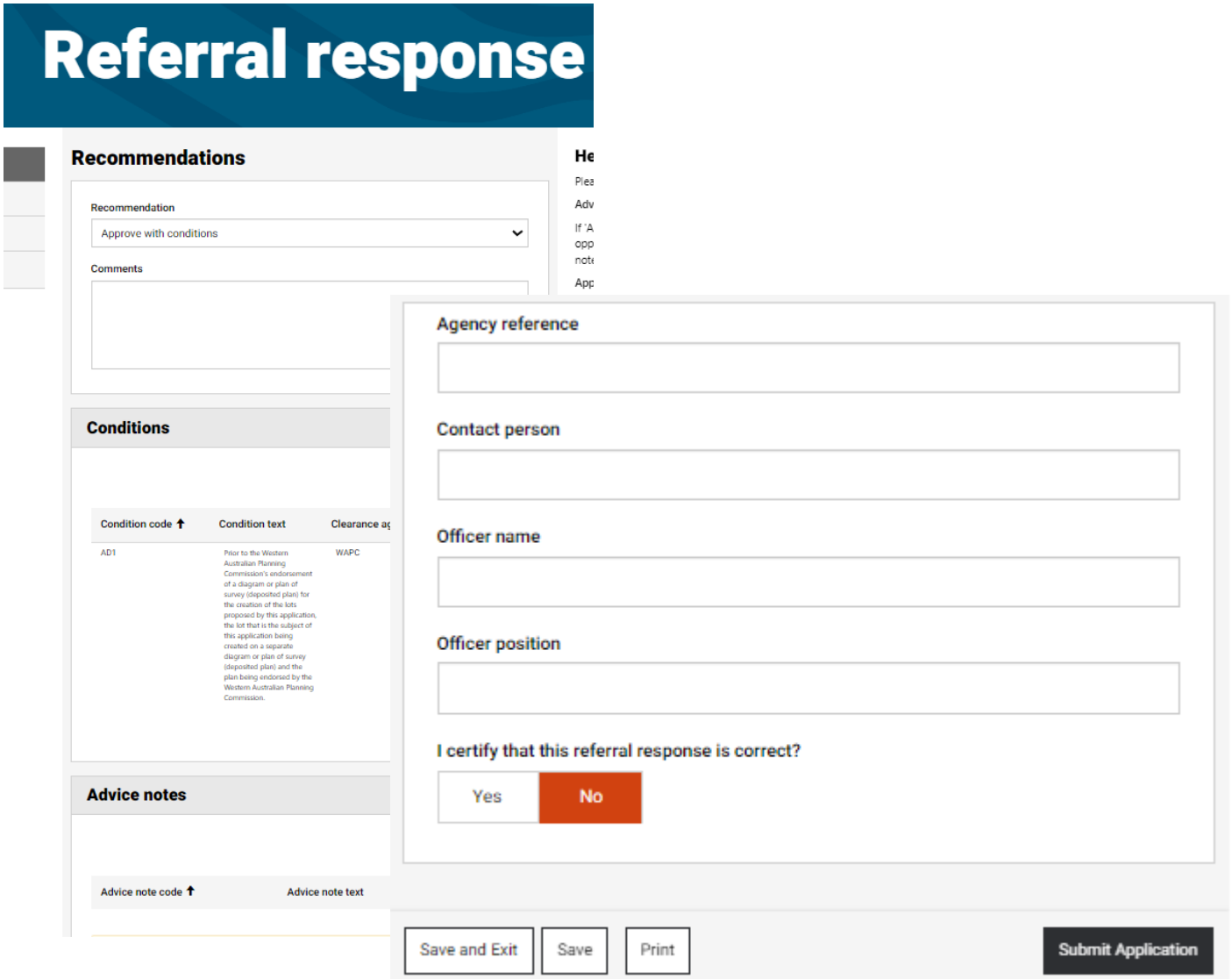
Referral Agent

Response form

16

Review the information that you added on **referral response page**, complete all the fields, certify that the referral is correct and **submit** the response. You may also **save** the application for a more senior officer to later certify and submit.



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Response form

17 There is **Help** content available for each screen on the Referral response form.

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Referral response

Follow your progress

- Application Details
- Referral Information
- Recommendations

Recommendations

Recommendation

Agency reference

Contact person

Officer name

Officer position

I certify that this referral response is correct?

Yes | No

Help

Please select your recommendation:

Advice

If 'Advice' is selected, there is an opportunity to add Comments, Advice note(s) and Supporting documents.

Approve

If 'Approve' is selected, there is an opportunity to add Comments, Advice note(s) and Supporting documents.

Approve with Conditions

If 'Approve with Conditions' is selected, there is an opportunity to add Comments, Conditions, Advice note(s) and Supporting documents.

Defer

If 'Defer' is selected, further information is to be provided within the Comment section or a Supporting document is to be uploaded justifying the 'Defer' recommendation.

There is an opportunity to add Conditions and/or Advice Notes in the case that the WAPC approves the application.

Refuse

If 'Refuse' is selected, there is an opportunity to add Comments, Standard and non-