

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.



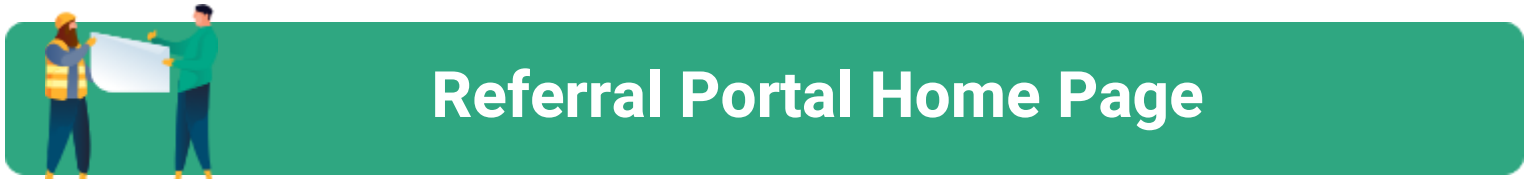
Referral Response

Content

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

Referral Portal

Referral Agent



Referral Portal Home Page

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



Welcome to Planning Online

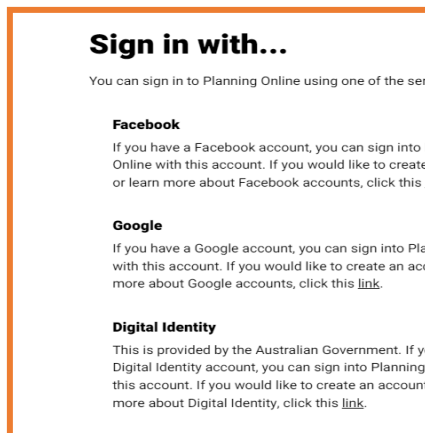
Sign in or register to access the Planning Online Portal where you will be able to:

- Lodge Applications for Land Use Planning
- View the progress of your applications
- Update your contact details

Have questions or need advice? Contact our Planning Online team by calling (08) 6551 8002 or email support at posupport@dplh.wa.gov.au



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



[Sign in as an internal staff member >](#)

Referral Portal

Referral Agent



03

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



Welcome to Planning Online

NEWS Are you a Service Administrator?

Please ensure that all your Service Users are now registered. [learn more on how to add a Service User](#)

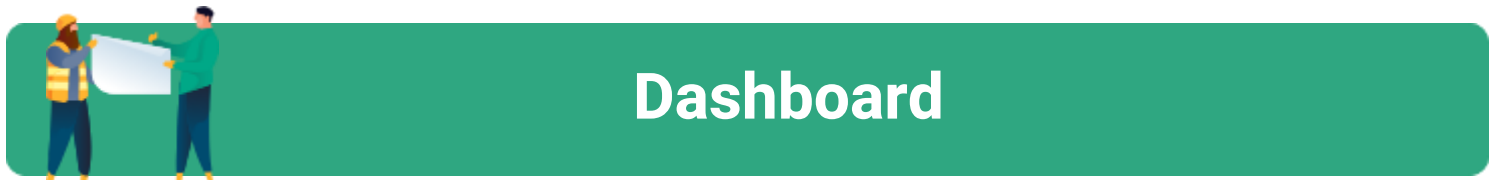
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Referral Portal

Referral Agent



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

Welcome, Tester 3 DAUT & Melville

Authorised to represent Melville, City of

Referred applications

Waiting for response Responded Determined Endorsements

WAPC reference number	Application type	Due date ↑	Local government	Contact person	Notes
		18/01/2024			
001100	Subdivision	13/03/2024	Melville, City of		Amended plan

Referral Portal

Referral Agent



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

Welcome, Tester 3 DAUT & Melville

Authorised to represent Melville, City of

Referred applications

Waiting for response Responded Determined Endorsements

Search applications w

WAPC reference number	Application type	Due date ↑	Local government	Contact person	Notes
		18/01/2024			<input type="button" value="v"/>
001100	Subdivision	13/03/2024	Melville, City of		Amended plan <input type="button" value="View"/>

Referral Portal

Referral Agent



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 response

- Follow your progress
- ➔ Application Details
- Referral Information
- Recommendations

Application Details

WAPC reference number	001100
Application type	Subdivision
Subject	Subdivision to create 20 Freehold (Green Title) lot(s) for Other purpose
Location	170 William St, Perth
Assessing officer	
Assessing officer email	

Document List

Document ↑	Document Type ↑
Consent to apply - Landowners Consent.pdf	Consent to apply
20240122 2024-00012 170 William St Perth - Form 1A.pdf	Lodgement PDF

▼
 View document

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

The screenshot displays the 'Recommendations' section on the left, which includes a dropdown menu with options: Advice, Approve, Approve with conditions, Defer, Refuse, and No comment. An orange arrow points from the 'Advice' option to the 'Advice notes' section on the right. The 'Advice notes' section features a table with columns for 'Advice note code' and 'Advice note text', and a 'Loading...' indicator. A red box highlights the 'Add advice note' button, with a red arrow pointing to it from the text 'Click on add advice note'. Below this is the 'Supporting documents' section, which also has a table with columns for 'File name', 'Document type', and 'Confidential?'. A red box highlights the 'Add document' button, with a red arrow pointing to it from the text 'Click on add document'.

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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

Add advice note ×

Would you like to add a non-standard advice note?

Yes

Add advice note

Summary

Situation

Policy link

Advice note code

Create advice note ×

Choose one record and click Select to continue

Search field

To search on partial text, use the asterisk (*) wildcard character.

W1

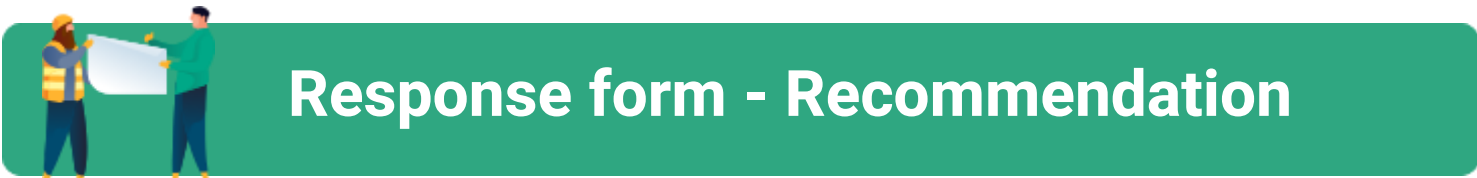
Advice note code	Advice note text	Summary	Situation
<input type="checkbox"/> ADa1	Community infrastructure		
<input type="checkbox"/> AMa2	Market Garden conditions no longer relevant		Impose to reflect the transitional nature of land uses.

Advice note code list

←

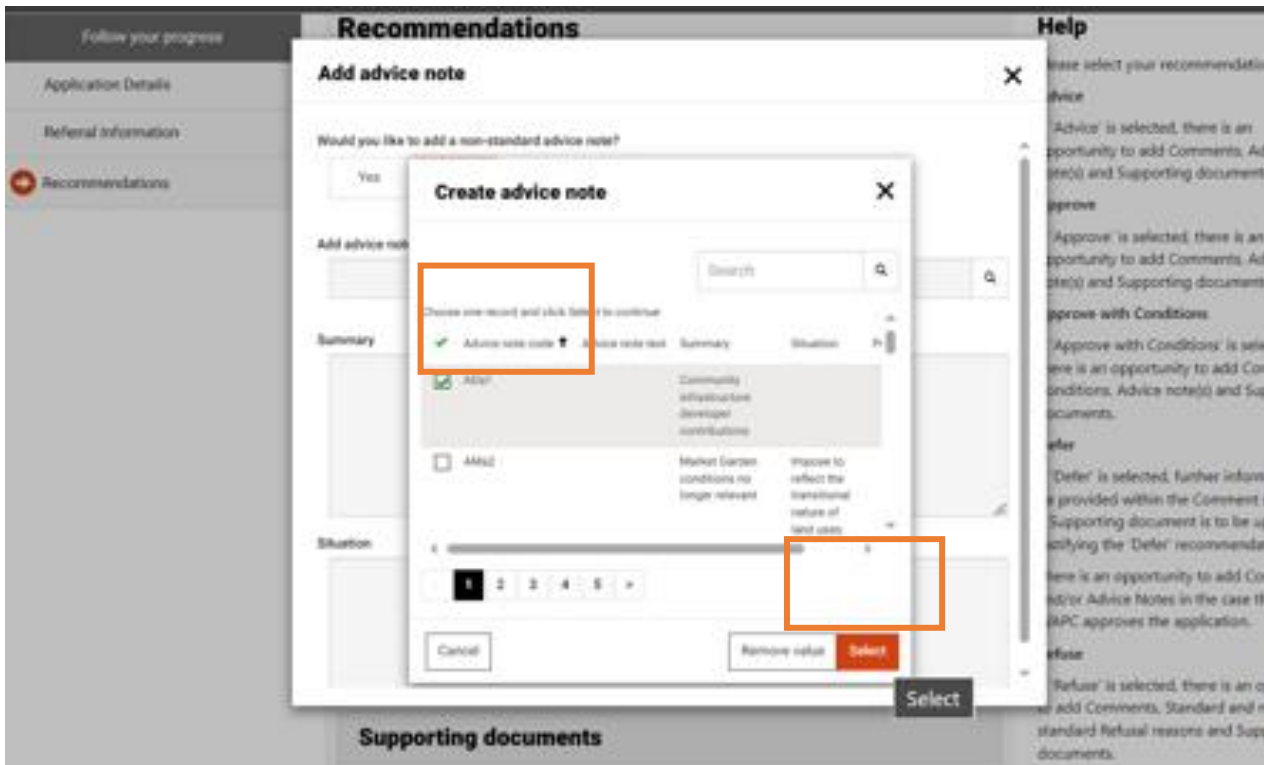
Referral Portal

Referral Agent



09

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



The screenshot shows the 'Recommendations' section of the Referral Portal. A modal window titled 'Create advice note' is open, displaying a table of advice note codes. The table has columns for 'Advice note code', 'Advice note text', 'Summary', and 'Situation'. The 'Advice note code' column has a dropdown menu open, and the 'Select' button is highlighted. The table contains the following data:

Advice note code	Advice note text	Summary	Situation
AMND	Market Garden conditions no longer relevant	Community infrastructure development contributions	Impose to reflect the transitional nature of land uses

Referral Portal

Referral Agent



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**

Add advice note
✕

Would you like to add a non-standard advice note?

Add advice note

Summary

Policy link

Advice note code

Advice note text

Condition [INSERT VALUE] is in acknowledgement of proposed Amendment No. [INSERT VALUE] that is viewed by the Western Australian Planning Commission to be a seriously entertained planning proposal, which will provide for developer contributions for community infrastructure.

Font Size B I U

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

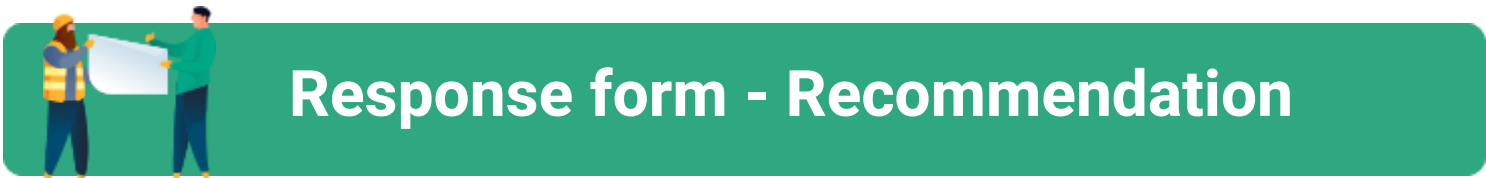
Add advice note
✕

Would you like to add a non-standard advice note?

Advice note code

Referral Portal

Referral Agent



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.

Add condition

Would you like to add a non-standard condition?

Condition code

NS1

Condition text

Enter text...

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Justification

Referral Portal

Referral Agent

Response form - Recommendation

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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

The screenshot shows the 'Add condition' dialog box. At the top, it asks 'Would you like to add a non-standard condition?' with 'Yes' and 'No' buttons. Below this is a 'Create condition' section with a search field containing 'W1'. A tooltip above the search field says 'To search on partial text, use the asterisk (*) without character.' Below the search field is a 'Search Results' table with the following data:

Condition code	Condition text	Clearance agency	Related code	Summary
<input type="checkbox"/> A01		WAPC		Create parent digital plan of (depos plan)
<input type="checkbox"/> A02		WAPC	Part lot	

At the bottom right of the dialog, there is a 'Select' button highlighted with an orange box. The dialog also includes a 'Cancel' button and a 'Remove value' button.

Referral Portal

Referral Agent

Response form - Recommendation

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

Add condition



Would you like to add a non-standard condition?

Yes

No

Condition

AD1

Summary

Creation of parent lot on diagram or plan of survey (deposited plan)

Situation

Imposed where application relates to a lot that has not yet been created, but is subject to Western Australian Planning Commission conditional approval.

Condition text

Prior to the Western Australian Planning Commission's endorsement of a diagram or plan of survey (deposited plan) for the creation of the lots proposed by this application, the lot that is the subject of this application being created on a separate diagram or plan of survey (deposited plan) and the plan being endorsed by the Western Australian Planning Commission.

Policy link

OP 1.1 Subdivision of Land - General Principles

Condition code

AD1

Condition text

Prior to the Western Australian Planning Commission's endorsement of a diagram or plan of survey (deposited plan) for the creation of the lots proposed by this application, the lot that is the subject of this application being created on a separate diagram or plan of survey (deposited plan) and the plan being endorsed by the Western Australian Planning Commission.

Clearance agency

Clearance agency

WAPC

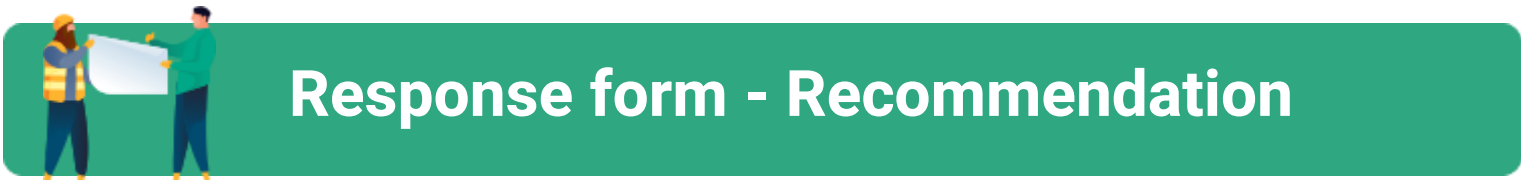
Save

Condition text

Clearance agency

Referral Portal

Referral Agent



Response form - Recommendation

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

Referral response

Recommendations

Recommendation

Approve with conditions ▼

Comments

Help

Please Advice

If 'Advi opport note(s)

Approx

If 'Appi opport note(s)

Approx

If 'Appi there is Condi docum

Defer

If 'Defe be pro a Supp justify

There i and/or PC use

If 'Refu to add standai docum

No Coi

Select i

Conditions

Add condition

Condition code ↑	Condition text	Clearance agency	View or edit
AD1	Prior to the Western Australian Planning Commission's endorsement of a diagram or plan of survey (deposited plan) for the creation of the lots proposed by this application, the lot that is the subject of this application being created on a separate diagram or plan of survey (deposited plan) and the plan being endorsed by the Western Australian Planning Commission.	WAPC	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <div style="text-align: right; padding-right: 5px;">▼</div> <div style="border: 1px solid #ccc; padding: 2px; width: 100px;"> <p>Edit</p> <p>Delete</p> </div> </div>

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**.

Add document

Document type

Letter
Marked up plan
Plan
Report
Other (please specify)

1

2 Add document

Document type

Confidential?

Yes No

Edit document

Document type **3**

Marked up plan

Confidential?

Yes No

Upload document

Choose File No file chosen

Upload File

Referral Portal

Referral Agent

Response form

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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.

Referral response

Recommendations

Recommendation

Comments

Conditions

Condition code ↑	Condition text	Clearance at
AD1	Prior to the Western Australian Planning Commission's endorsement of a diagram or plan of survey (deposited plan) for the creation of the lots proposed by this application, the lot that is the subject of the application being created on a separate diagram or plan of survey (deposited plan) and the plan being endorsed by the Western Australian Planning Commission.	WAPC

Advice notes

Advice note code ↑	Advice note text

Agency reference

Contact person

Officer name

Officer position

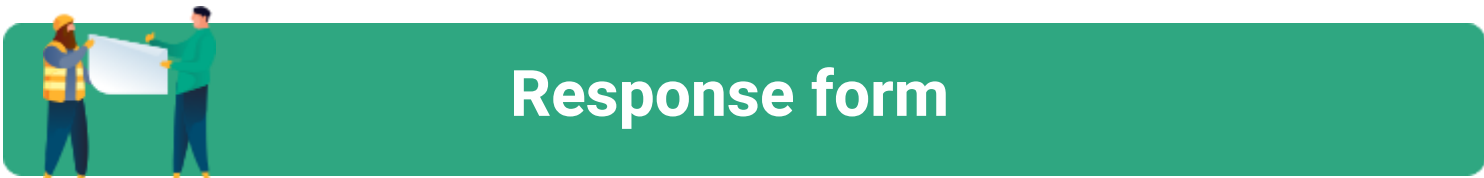
I certify that this referral response is correct?

Yes No

Save and Exit
Save
Print
Submit Application

Referral Portal

Referral Agent



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



- 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-