Planning Portal Training Manual

Registration and Create an Application

Contents

Register to use the Submission Portal

If you are new to the Submission Portal, you will be required to register as a user to make use of the utilities.

Planning Portal NI has changed. If this is the first time you are logging into the new Planning Portal, your login details will no longer work. You will need to set up a new account by registering for an account below.

Email Address

Enter your email address

Password

Enter your password

Forgot password

Log in

Register for an account

Click on **Register for an account**. A verification email will be sent to the address you have entered. The verification email contains a code which you must enter to gain access to the system.

We've sent a verification code to your inbox. Please enter it in the field below. If you haven't received the email, check your spam folder or click the re-send code button.

Email address

reidgault@hotmail.co.uk

Verification code

Verification code

Verify code

Re-send verification code

Continue

The verification code will expire after 15 minutes at which point you will need to request a new one.

If the valid code is entered, you are invited to continue.

✓ **E-mail address verified. You can now continue.**

Email address

████ @hotmail.co.uk

Use a different email address

Continue

Cancel

You will be prompted to enter a password for this login name. Enter and confirm a password of your choice which satisfies the criteria described.

ℹ **Password requirements:**

- Your password must have minimum of 8 characters
- Maximum of 16 and containing at least 3 of the following:
- Lowercase characters
- Uppercase characters
- Numbers (0-9)
- Symbols

Create Password

Create Password 👁

Re-enter Password

Re-enter Password 👁

Once your new password has been accepted, you will be prompted to enter some personal information. Some fields are mandatory and are indicated on the screen.

Title (optional)

Title (optional)

First name

This information is required.

First name

Surname

This information is required.

Surname

Organisation Name (optional)

Organisation Name (optional)

Address Line 1 (optional)

Address Line 1 (optional)

Address Line 2 (optional)

Address Line 2 (optional)

Address Line 3 (optional)

Address Line 3 (optional)

Town (optional)

Town (optional)

Post code (optional)

Post code (optional)

Country

United Kingdom

Telephone number (optional)

Telephone number (optional)

Fill in the relevant information as required. Most fields are optional.

Select your Account Type category

This information is required.

○ **Personal**

Low volume personal usage.

○ **Professional**

For business use for all work relating to your company, employer or contractor.

○ **Local Authority**

Usage as part of your job at a Local Authority.

Finally, set you security question details.

Select your security question

This information is required.

Select your security question ⌄

Your security question answer

This information is required.

Your security question answer

By registering, and as a customer, you will share personal data with us. This will be used, looked after and retained in accordance with our Privacy Notice, which also tells you about your rights in connection with that data.

This information is required.
☐

When you have completed this section, click on **Register**.

Register

This will take you to the home page of the Submission Portal
The next time you log in you will only be required to enter your email address and password.

Home Page

Once you have registered or logged in, you will arrive at the Home page.

To view a current application simply click '**Applications – Manage applications'** where you should be able to see all applications whether they are in the draft stage or the submitted stage.

To create a new application, click '**Applications – Manage applications – Start new application'**, as highlighted below.
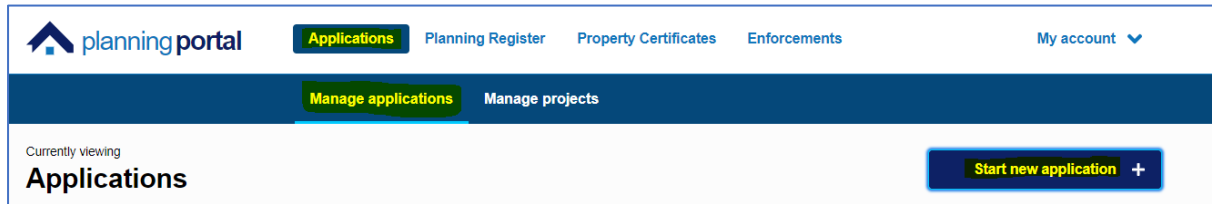
New Application

Once you have clicked '**Start new application'** it will bring you to the following page.

Here you will notice that the page is split into 2 sections, with the actions section on the left (the information we need from you) and the information on the right (information to help you with your application).

Firstly, you will need to give your application a name, this should be something that identifies the proposal such as a site address.

Once you're happy with your application name you can click '**Continue'**. For the next section you will need to know the exact location of your proposed site.

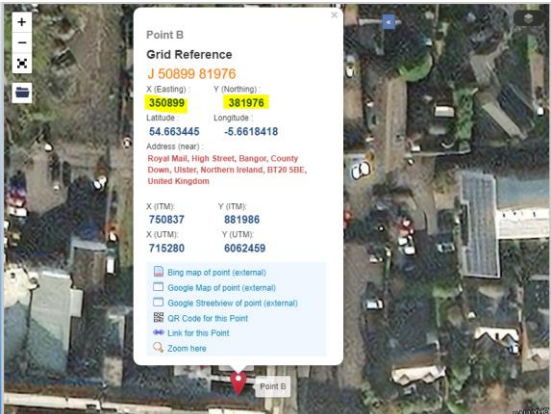You can find your site using a known postcode or a grid reference.

Entering a postcode and clicking '**Find address'** will bring up all the addresses for that postcode. From this you should be able to select the addressable property for your application.

If the site in question isn't an addressable property but you have a grid reference then you can enter the Eastings and Northings in the '**Enter Easting and Northing'** link, as highlighted above.

If you do not have either then you can also search for a grid reference using the '**Search for a grid reference link**', as highlighted above.

This will take you to irish.gridreferencefinder.com where you will be able to use the map or search tool on the left-hand side to find your site.

Once you've found your site, you will need to **right click** on the area which will bring up you grid reference as displayed below. You should be able to copy this straight into the '**Enter Easting and Northing'** link, as shown below.
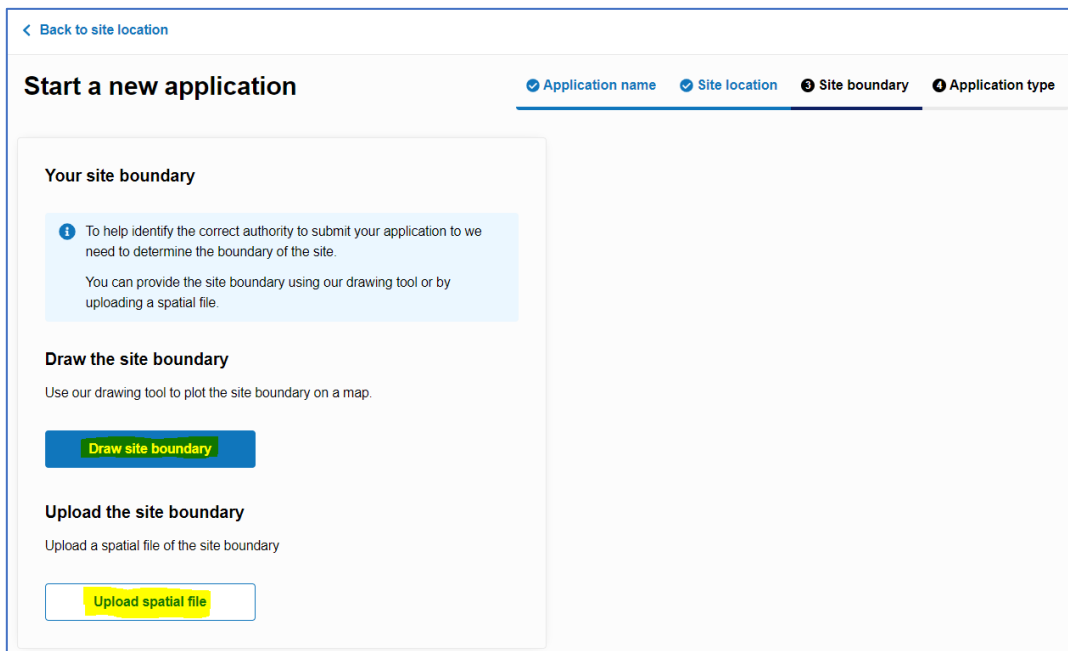

Once happy with the site location click '**Continue'** which will take you to the next step '**Site boundary'**.

Draw Site Boundary

On the **Site Boundary** page, you will notice 2 options, '**Draw site boundary'** and '**Upload spatial file'**.
For the most part you will need to click '**Draw site boundary'** unless you have a specific spatial file which is smaller than 1 mb.
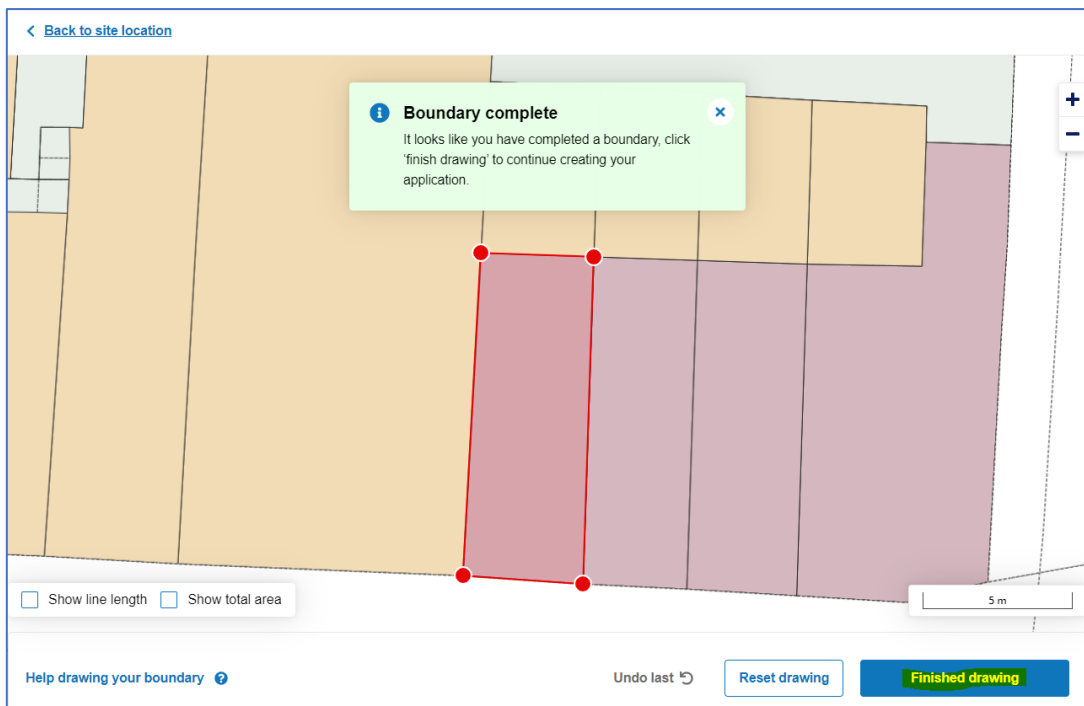
When you click '**Draw site boundary'** it will bring up a quick tutorial which runs through how to capture a site boundary. Left mouse click at your starting point, left mouse click when changing direction, until you get back to your starting point.
The mapping follows Ordnance Survey Northern Ireland so land boundaries should be well defined and can be snapped to when capturing the extent of your site boundary.
To have a complete site boundary your start and end point must be the same.

Once your end point has been reconnected to the original start point, the system will let you know that the boundary is complete, as shown above.

You can then review your boundary before clicking '**Finished drawing**' if you're finished or '**Reset drawing**' if you need to correct your boundary. There is also a 'Undo last' button which is handy if your last point didn't snap to the correct location.
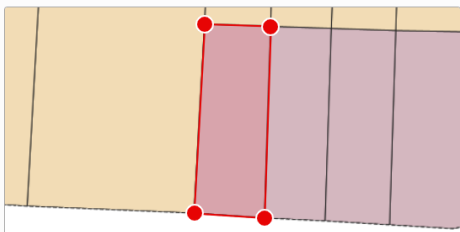
When you do click '**Finished drawing**' it will take you to a final review page where it shows the site boundary alongside the location and total area, as shown below. Again, there is the option to change boundary if not happy or proceed by clicking '**Continue**'.

Application Type

The final part of this section is defining the application type which is split into 2 segments: **Application Type** and **Application Category**, as highlighted below.

If you need any help with selecting your application type, then remember there is the '**Help me choose application type'** on the right-hand side as highlighted below.

This link will take you to a planning application document which outlines all the planning applications for Northern Ireland. There are many different types of application. It is important you select the correct type.

Once you've selected your application type and application category you can click '**Continue'** which will bring you to the final review screen where you will click '**Create application'**.

When this stage is complete, you can either continue the application or come back to it.

If you come back to the application at a later date you will be able to find your application in the 'Manage applications' section. When you select the outstanding application that you wish to continue, it will bring up the following page with what you have left to complete before your application is able to be submitted.

Important: You will not be able to submit the application until all steps and requirements have been met.

All the information is detailed in the '**Manage applications**' view along with the remaining sections: Complete application questions, Add plans and documents, Calulate Fee.
The Application actions dropdown will give 3 options for your current application.
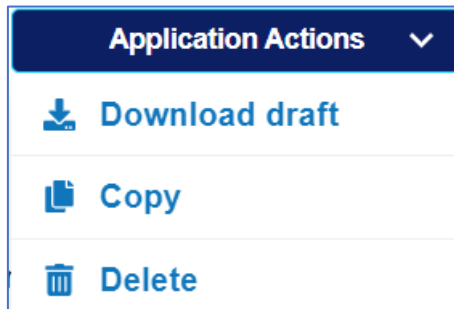
Download Draft - will download a copy of your application in its current state of completion.
Copy – will create a new application based upon the information contained within the current application. You will be give a prompt to remove specific pieces of information from the copy.
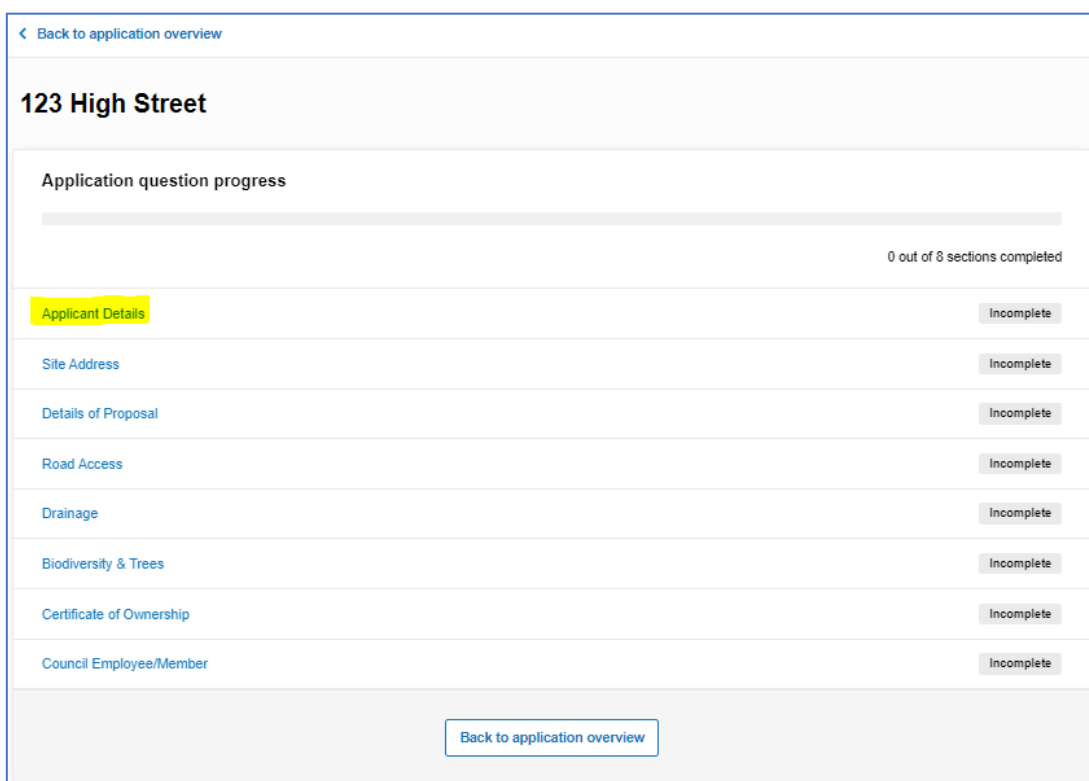**Delete** – will delete your application

Completing the Application

To continue progressing your application click '**Continue'** on the '**Complete application questions'** section. That'll bring up the following page which details all the questions you will have to complete. All these questions are required and come with a helpful ❓ which outlines what is needed in this field and gives examples.

As mentioned in a previous section, there are many different types of planning application and the questions presented to you will be determined by the type of application you have chosen. Many of the more complex applications will present multiple screens to the applicant depending upon the answers to previous questions and are context specific to those answers. Mandatory fields are marked as ***Required** and if left blank, the system will not allow you to proceed to the next screen or stage unless they are answered.

<table>
<tr><td colspan="2">‹ Back to application overview</td></tr>
<tr><td colspan="2">123 High Street</td></tr>
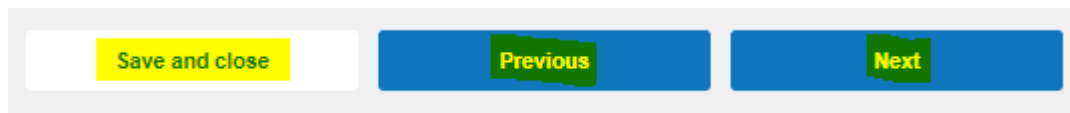<tr><td colspan="2">Application question progress</td></tr>
<tr><td colspan="2" align="right">0 out of 8 sections completed</td></tr>
<tr><td>Applicant Details</td><td>Incomplete</td></tr>
<tr><td>Site Address</td><td>Incomplete</td></tr>
<tr><td>Details of Proposal</td><td>Incomplete</td></tr>
<tr><td>Road Access</td><td>Incomplete</td></tr>
<tr><td>Drainage</td><td>Incomplete</td></tr>
<tr><td>Biodiversity & Trees</td><td>Incomplete</td></tr>
<tr><td>Certificate of Ownership</td><td>Incomplete</td></tr>
<tr><td>Council Employee/Member</td><td>Incomplete</td></tr>
<tr><td colspan="2" align="center">Back to application overview</td></tr>
</table>

If at any point you need to exit you can click '**Save and close'** and if you need to go back to the previous question, click '**Previous'**.

Save and close	Previous	Next

Once the questions have been completed you will notice the overall completion percentage go up and the '**Complete application questions'** has a tick next to it to mark as complete.

Required Documentation

The next stage of the application is the '**Supporting documents'** tab which is where you can upload any supporting plans and additional documents.

There are 3 mandatory pieces of documentation which are required to progress your application:

Site location plan
Existing and proposed elevation
Floor plans.

Additional documentation such as survey's, assessments and reports can be uploaded in this section as well and will appear in the '**Additional documents'** section.

To add a piece of supporting document you will need to click the '**Drag and drop files** or **Browse'** button or drag and drop the file.

When you've selected the document, you will need to choose which document type it is and give a brief description before clicking the '**Upload files'** button.

Once you've uploaded the first piece of documentation you will notice '**Mark a document as covered by another'** appear in the '**Add supporting documents'** section. This can be selected if you have a single piece of documentation which covers multiple pieces of supporting documentation.

If your supporting documentation is too large to upload or you have it in paper form you can still send your documents by post via the '**Need to send a document by post?'** link. Once the 3 pieces of documentation are either uploaded, covered by, and sent via post then the application can progress onto the next stage.

Calculate the Fee

The final stage of the application is the '**Calculate Fee'** stage which requires you to answer the planning fee questions.

If you're unsure of what type of planning permission you require then you can click on the question mark which includes a link to webpage explaining planning fees.

At the end of this section, you have the option to '**Save and close'** to exit or '**Finish and close'** to confirm the planning fee.

Submit Application

Finally, once all steps have been completed there is just the '**Submit application'** step left to complete, as shown below.

Pay and Submit

Click '**Pay and submit'** which will bring up a required declaration and which payment method you'd prefer to use before clicking '**Submit and pay'**, as shown on the following page.

Some authorities may offer more payment options than others.
The main types of payment methods are:

> **Secure online payment by Credit/Debit payment.**
> **Cheque**
> **Bank Transfer (BACS)**
> **Telephone**

Secure online payment will direct your payment the identified local authority via their Gov Pay account. The process follows the normal payment process for credit/debit card transactions.

123 High Street

Application type:	Householder development
Submitting to:	Ards and North Down Borough Council
Documents submitted:	3

Amount due
£291.00

View details

Application declaration

To submit your planning application you must agree to the below declaration.

I / We hereby apply for planning permission to carry out the development described in this application and the accompanying plans.

I/We also accept that, in accordance with the Planning Portal's terms and conditions:

- Once submitted, this information will be made available to the Local Planning Authority and, once validated by them, be published as part of a public register and on the authority's website;
- Our system will automatically generate and send you emails in regard to the submission of this application.

☐ I / We agree to the outlined declaration

Select how you would like to pay

○ Secure online payment by credit/debit payment

○ Cheque

Submit and pay

By clicking Submit and pay you will submit your application to the local planning authority.

Once received, the authority should let you know of its process to determine the application in accordance with planning legislation and its data management policies as part of its responsibilities to you.

Cancel   Submit and pay

Once the payment process has been completed, you will be advised of your reference number in respect of this submission.

On checking your email, you will have received two emails.

The first one is generated when the submission process has taken place after payment.

The second will arrive when you application has been automatically imported by the local authority system.

These two emails can appear simultaneously.

A message on the email will advise you that if you are submitting your application outside of normal authority working hours, that it will not be processed until the next working day.

For example, submitting an application late on a Friday prior to a bank holiday Monday means your application will not be considered until Tuesday of the following week. A sample email is shown below.

Example Email Confirmation

An update on your Single Property application with the reference number PT-10000291.

Your application has now been transferred to the local authority and they will review and validate it within their timescales. This email is not a formal acceptance of your application by them. If more information is needed, then they will contact you directly. If you have submitted your application outside the Authorities working hours, it will not be formally received by them until the next working day.

Details of your application

- Application Type: Single Property
- Planning Portal Reference number: PT-10000291
- Agent: Fred Bloggs
- Application site address: 123 Main Road, Belfast, County Down, BT7 3AX
- Submission date: 24/08/2022 19:25:41
- Received date: 24/08/2022 19:25:42

Agent Home Screen

As agents will be in the position of applying on behalf of multiple clients, the Home screen facilitates the storage of applications that can be managed and viewed as required.

Click on the **Search within My Applications** to find an application based upon a keyword. The results are filtered accordingly.
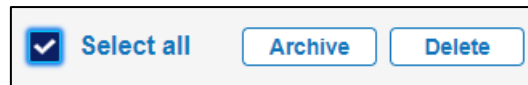

Click on the application title to **View** or **Amend** the submitted details. Click on the ellipsis button on the right of the application screen for further actions that can be carried out.

Click on **Clear Search** to remove the search filter.

Clicking the **Select All** tick box will select all of the applications on screen and will give the options to **Archive** or **Delete**.

Individual applications can be Viewed, Copied or Deleted by clicking on the ellipsis button to the right of the individual application tile.
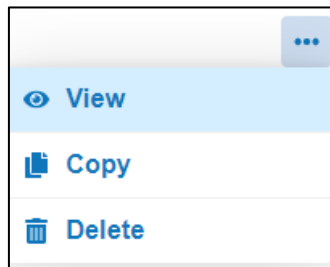
Copying an application will create a new application with the same details that can be edited before submission.

Click the **View** buttons to display your application in **List** or **Tile** format.

Advanced Filter

The panel to the left of your screen allows for more advanced filters to be placed on the application set.

Filter Applications

Clear all filters

Application Status

☐ All (15)

☐ Draft (1)

☐ Submitted to LPA (2)

☑ Received by LPA (12)

Application type

Choose application type

Version number

All versions ⌄

Local planning authority

All authorities ⌄

Custom date range

From:

dd/mm/yyyy 📅

To:

dd/mm/yyyy 📅

The options available are self-explanatory and more that one criteria can be used to filter your application set.

Clear All Filters will reset the application list.

Your application may number more than can be displayed on a single page. This will be indicated by the page counter at the bottom of the screen and will allow you to move from page to page.

Viewing page **1** of **2**

Results per page 12 ⌄   «   **1** 2   »   Jump to page

Manage Projects

Agents can group their applications and allow other members of their team access to a group or groups.

This is achieved by selecting **Manage Projects** at the top of the screen. Click on **Create Project**.

Create project   +

Add a Project Name and description for the project.

Project details

Project name: * Required

Use a name that clearly identifies the project to you and project members, such as the development name. This will be seen by all users that are added to the project.

Project X

Project description: * Required

Grouped applications for Project X

34 of 500 characters

Add team members to the project.

0 Members   **Add team member to project**

Give members of your team access to the project and set permission levels for them

Clicking on **Add team member to project** will open a new window.

Note - You may only add team members who are already registered as users on the Planning Portal.

Add the team members email address and assign the relevant permissions for that user. Click **Confirm** to add the team member. Add other members as required.
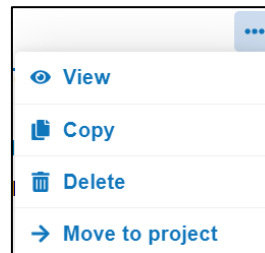

Team members may be **Deleted** by clicking on the ellipsis button.
Click on **Create Project** to go to the next stage.

The project has now been created. Team members can now start adding new applications to the project group.

Existing applications can be added to the group by clicking the ellipsis button on the right of the application tile.

Click on **Move to project**. If more than one project is available you will prompted to select the project. Once selected, you will be asked to conform the move. The application will be moved to the selected folder.

Applications may be moved out of the folder by clicking the ellipsis button and selecting **Move out of project.**
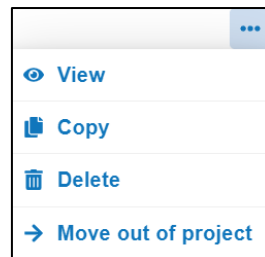
Maintenance of the Project can be accessed by clicking Manage Projects. Choose View project details to invite new or delete existing team members.

Add new team members by choosing **Invite team member to project**.

Delete an existing member by clicking on the ellipsis button on the right of the user tile.

Other project details may also be amended via this screen.

Note – Deleting a team member from the project will also delete all applications created by them.