Customer Portal Series

How To: View and Submit Revisions Required

During the In Review Stage, reviewers may request revisions or additional information related to Application Documents. The application will be returned as **Applicant Revisions** - **Additional Information Required** by the Planner responsible for the file.

At this stage of the application process, only the Application Documents are editable. No changes can be made to the application itself.

How to see Revisions Required:

1. When an application is returned to the applicant, revision comments can be viewed from the customer portal - **MY ACTIVITIES** tab.

2. The application that has been returned will have red text stating Revisions Required and will have a blue link: Additional Info. Required.

3. Follow the blue link.

   NOTE: Clicking elsewhere on the file name opens the permit file review tab not the Revisions Portal page. (There will be no re-submit button or changemark information).

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4. The Revisions Page contains 8 sections:

1) General Planning Application Information

2) **Planner (Reviewer) Comments** written by the Planner responsible for the file with instructions for next steps.

3) **Changemark Notes**. Brief preview of all Changemark comments in table format. **Download corrections** as PDF to see details.

4) **Applicant Response Comments** – *Required Field - describe the work / changes made before resubmitting the application.

5) **Uploaded Documents Section:** Tracks uploaded application documents and allows revised documents to be uploaded with version control.
Documents with Changemark
Comments will have this symbol ⚠ to indicate the need to review.

6) **Staff Provided Document** section displays documents sent to the applicant from staff for review. For planning applications this may also contain detailed review feedback related to the application.

7) **Edit Professionals / Contractors** allows the applicant edit contractors involved in the application.

8) **SUBMIT** button to return application and all requested changes to staff.

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A) **General Application Information**: A summary of the application including submitted date, file number and brief job description.

B) **Planner Comments**: this section is written by the Planner assigned to the file and should provide clear direction on next steps.

C) **Download Changemarks**: select this icon (⬇) to download the documents with Changemark Comments to be viewed in E-plan Viewer; a program within the customer portal that allows Applicants to view comments directly on an application document. No additional software is required.

D) **Uploaded Documents Section**: This section tracks what documents have been uploaded and allows new documents to be uploaded.

    i.   **Existing Documents**: These are all the documents previously uploaded as part of the application.

        Note: existing documents cannot be deleted but they can be 'excluded'.

    ii.   **Upload New Version**: Version control is available in the customer portal Revisions Page.

        •   To upload a NEW version of an existing document, **select the box beside the existing document**. This makes version control functions visible / available.

        •   Select **Upload New Version** and then upload the new version of the document to be uploaded.
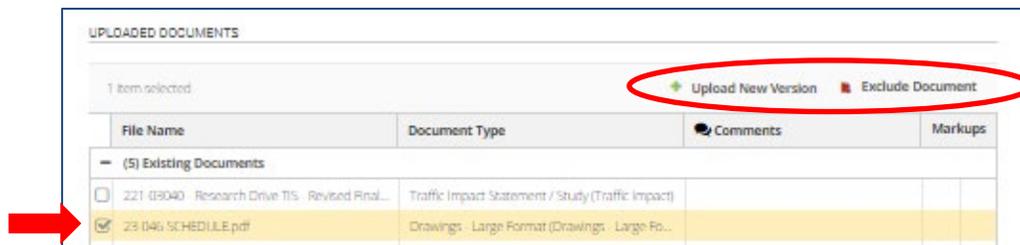

    iii.   **Exclude Document**: to exclude a document instead of uploading a new version. The document will be marked as excluded. A new document of this "Document Type" must be uploaded if the excluded document is a required document.
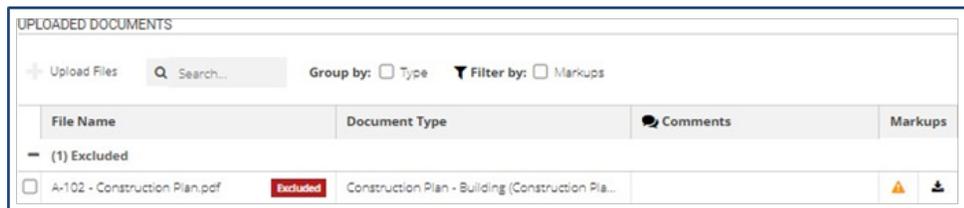
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    iv.   **Document Type**: the middle column of the uploaded document table shows the document type. The document types are listed within a pull-down menu. Each document must have a document type selected. each required document must have a corresponding document with that document type.
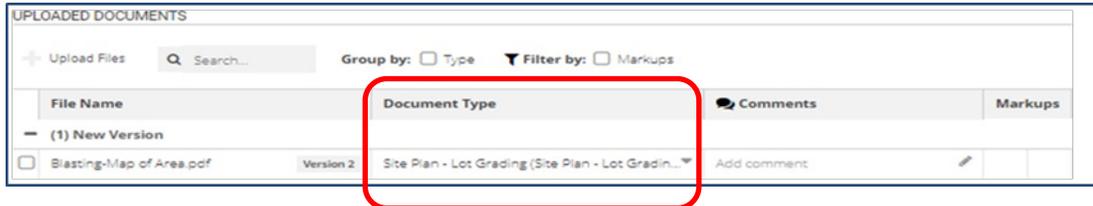
E) **Staff Provided Documents:** When staff upload documents for the applicant to review, they will be located in this section of the revisions page. They are also available in the file at any time when the revisions page is not available.

Select the Download link to review documents in this section.

F) **Edit Professional / Contractors**: Select the button to open a pop-up window to add additional professionals / contractors or edit existing.

    NOTE: Contractors must have a contractor account to be added here.

        All contractors listed here can see and edit the application – for example reply to revisions or see staff provided documents.

G) **Submit:** The submit button returns the Application to staff. Once the revisions are submitted this Review Portal page is no longer accessible. No further changes can be made by the applicant.

5. The system will confirm the re-submission of the application was successful.

6. **No Further Action is required at this time**. The application is returned directly to the Responsible Planner to continue with the review of the file.

   Continue to monitor your Customer Portal account for future possible Revision Requests.