ePlanning.scot

User guide

Introduction

We have designed the ePlanning.scot website to provide an efficient and supportive process for members of the public and professional services (such as architects and agents) to apply for planning permission or appeal against permission which has been refused or against conditions applied when permission is granted.

The online process provides easy-to-use forms to allow you to send in planning applications and appeals online and helps you to send in the relevant form, documents and any associated fee..

This guide describes how to use the site.

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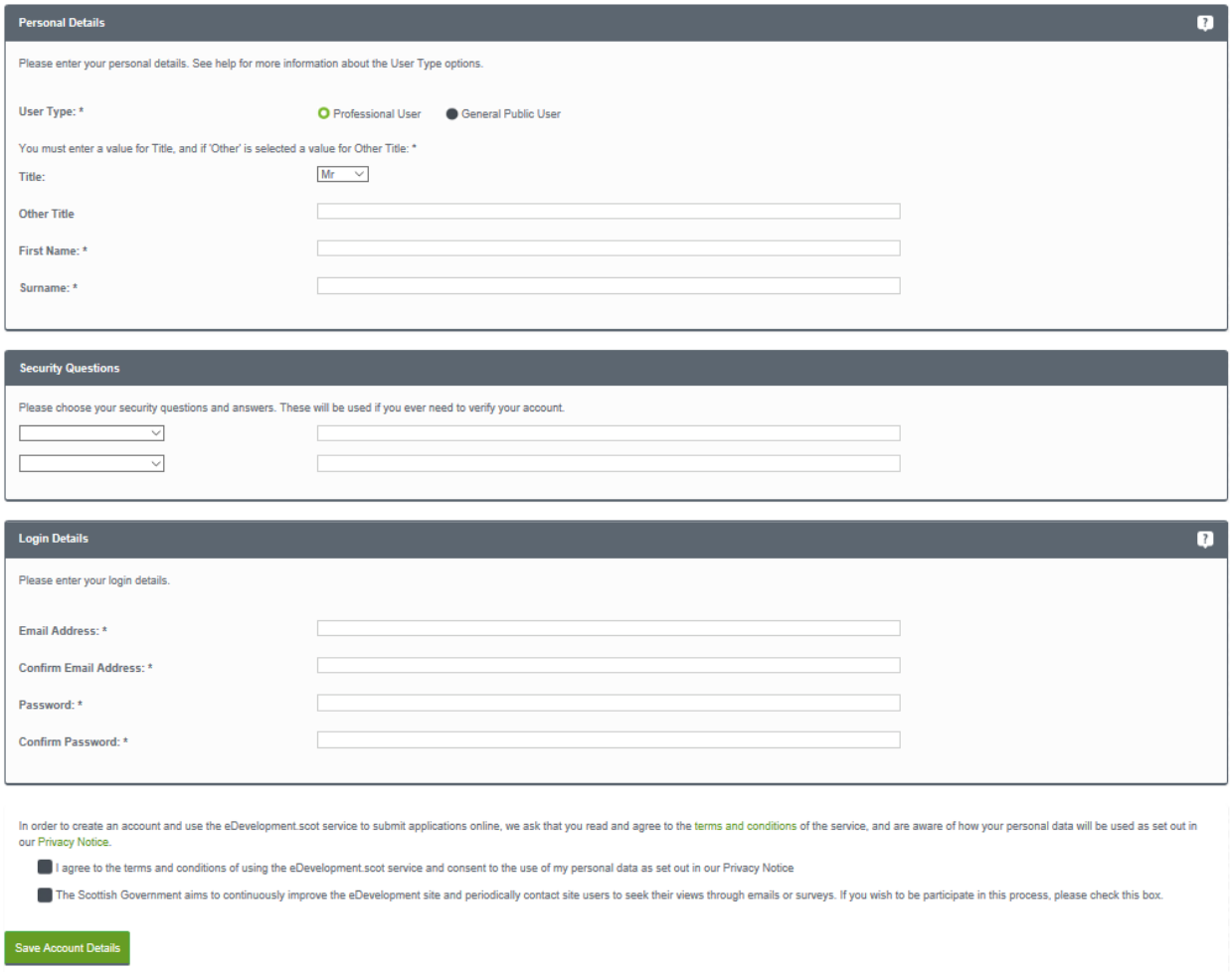
Create a user account

Before you can use the ePlanning Scotland site to manage applications or submissions, you must first create a user account from the home page of eDevelopment.scot. Creating an account gives you access to both the eBuildingStandards.scot and ePlanning.scot services.

1. To create a new user account, click on the button on the Home page.



2. Register your personal details by filling in the following fields.



- **User Type** – click to say whether you are a member of the public or a member of a professional organisation.
- **Title** – Select the title you want to be addressed by.
- **First Name** – enter your first name
- **Surname –** enter your surname

3. Please choose your security questions and answers. These will be used if you ever need to verify your account..

   - **Security Questions -** select two questions from the drop-down menu and enter the answers (please note that these need to be unique).

4. Your login details are the details that you will use to access ePlanning.scot

   - **Email Address** – enter your email address. Enter it again below to confirm that it is correct.
   - **Password** – enter a password that will allow only you to access your ePlanning.scot account.

   Note – Passwords must be over 10 characters long, must not contain spaces and must satisfy at least three of the following rules:

   - At least one English lowercase character (a-z)
   - At least one English uppercase character (A-Z)
   - At least one numeral (0-9)
   - At least one non-alphanumeric character (character other than a-z, A-Z, 0-9)

   Enter the password again below to confirm that it is correct.

5. Click to read the terms and conditions that apply when you use this site. When you have read them, tick the box to show that you agree to them.

6. When you have entered your personal and log-in details, click on the **Save Account Details** button.

7. We will send you an email to the address you entered. This provides final confirmation that you want to create an ePlanning.scot account. When the email arrives, click on the link in the email which will return you to the ePlanning.scot site.



Confirmation your account has been created successfully

Hello V Pershon,

To confirm creation of your account please visit the following URL:

http://80.4.144.179:81/eDevelopmentClient/custompages/registration.aspx?id=b02fde2e-17e5-4e92-9aa2-0f19f4bdb8c0

Please Login with the email address and password you originally selected.

This email has been sent from the eDevelopment Scotland. This e-mail and any attachments are private and confidential. If you are not the intended recipient of this e-mail, any disclosure, copying, distribution or use of its contents is strictly prohibited. Please contact the eDevelopment Scotland helpdesk on 0131 244 1450 immediately and then delete it (including any attachments) from your system. All emails and attachments are virus scanned. It is your responsibility to ensure that any onward transmission, opening or use of this message and any attachments will not adversely affect your or the onward recipients' systems or data. Please carry out such virus and other such checks as you consider appropriate.

8. When you click on the link, you will be brought back to the last step of setting up your account. You will need to add your address and phone number then click **Save Account Details** to finish.

User guide

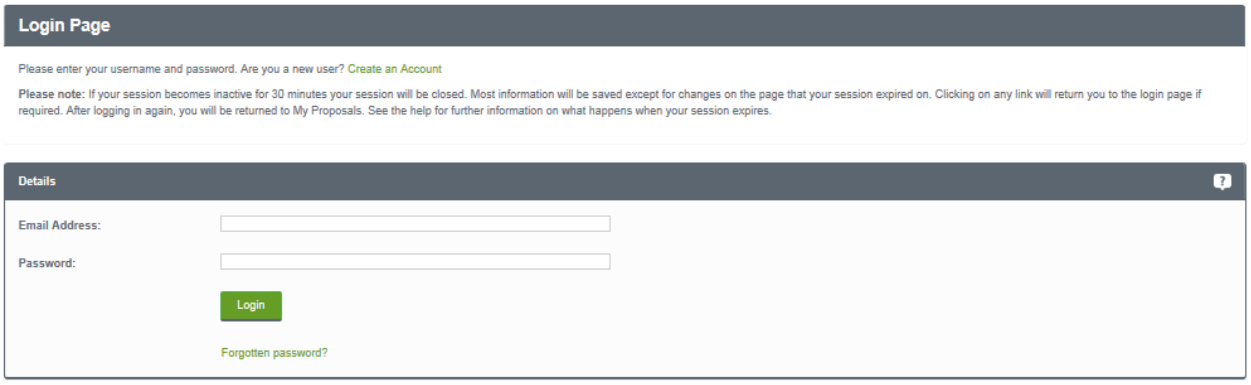
Log-in

To use ePlanning Scotland, you need to log in to the site using the user name and password you provided when you created your account.

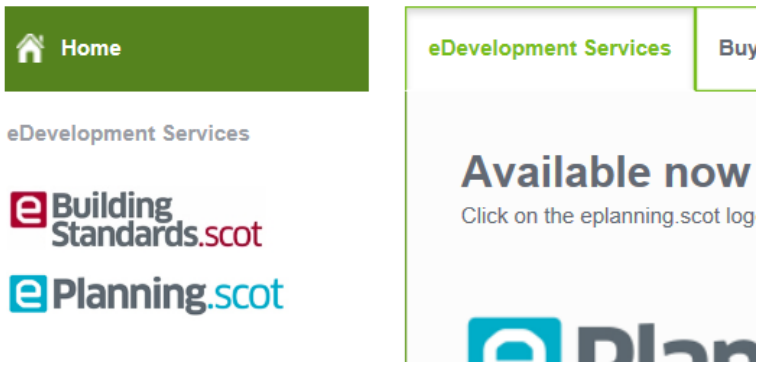
1. Click on the **Log-in** button on the home page.



2. Enter your user name and password, then click on the Log-in button.



3. Once logged on you can navigate to both eBuilding Standards Scotland and ePlanning Scotland using the appropriate icon

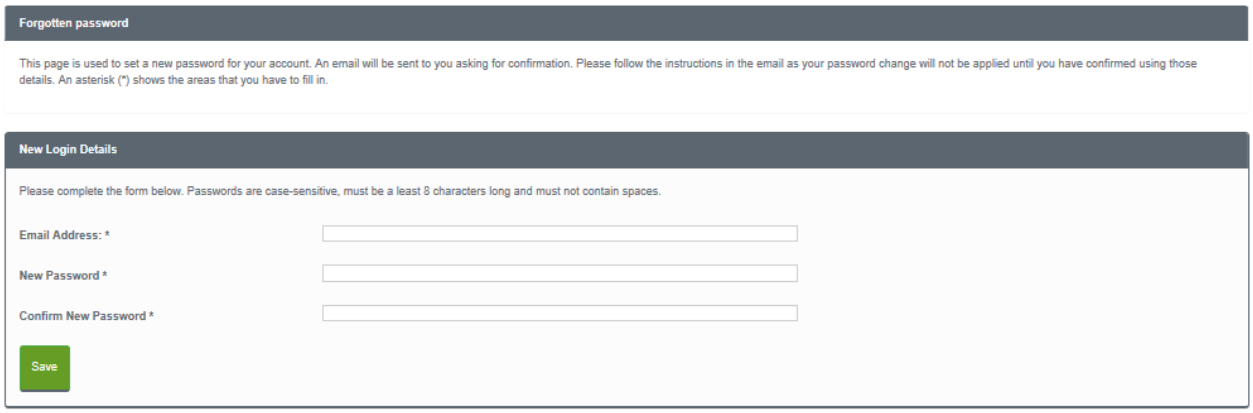


Timeout

After a period of inactivity (usually 30 minutes), your session will automatically be logged out. To continue working, you must log in again. Once you have done that you will be returned to your My proposals page.

Forgotten password

1. If you forget your password, click on the **Forgotten password?** Link.



Enter your email address and then enter a new password twice. Press the **Save** button

2. We will send you a confirmation email to your email address. When it arrives, click on the confirmation link which will bring you back to ePlanning.scot. You will now be able to log in with your new password.

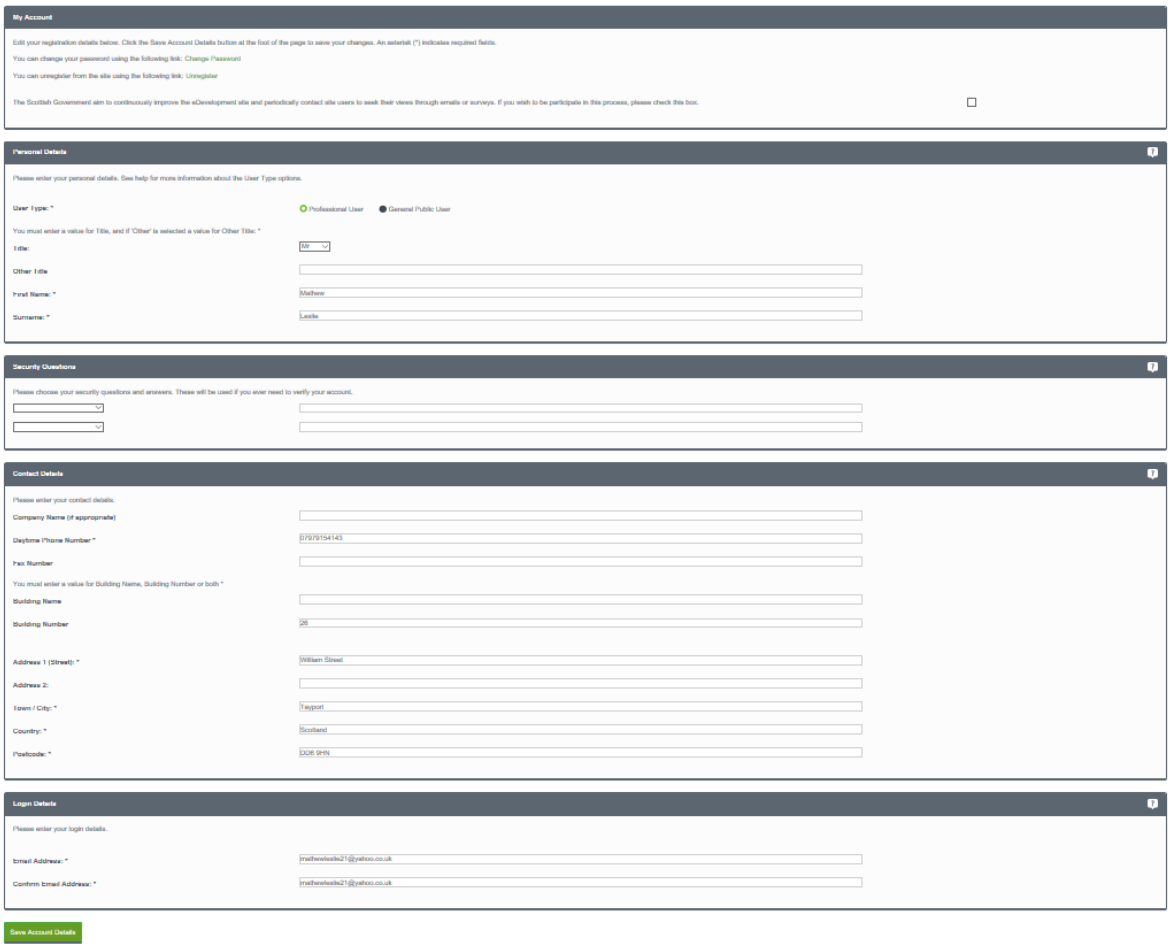
Log-out

When you are finished with ePlanning Scotland, remember to log out by clicking on the **Log-out** button in the menu bar on the left-hand side of the screen.

My account

Once your account has been created it is a good idea to add further details, such as your address, which you can include in your applications. You can access the My Account page at any time to allow you to update any of your account details.

1. To access your My Account page, click on My Account in the left-hand menu bar.

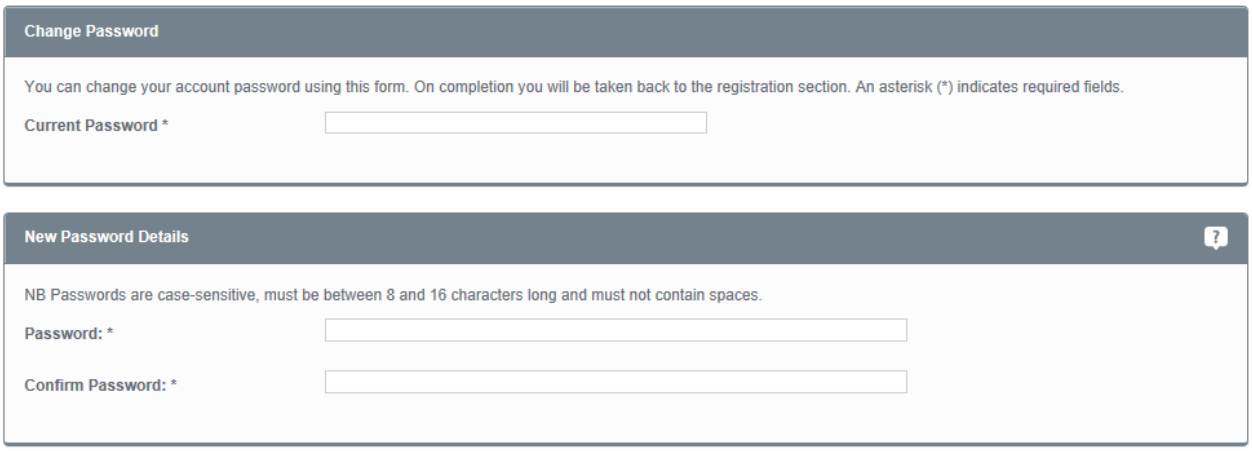


2. Your personal details and Log-in details will be filled in already, but you can edit these at any time.

3. Fill in your contact details, including:
   - **company name**
   - **phone number**
   - **fax number**, and
   - **full address**, including postcode.
4. When you have finished, click on the **Save Account Details** button.

Change password

1. To update your password, click on the **Change Password** link in your My account page.



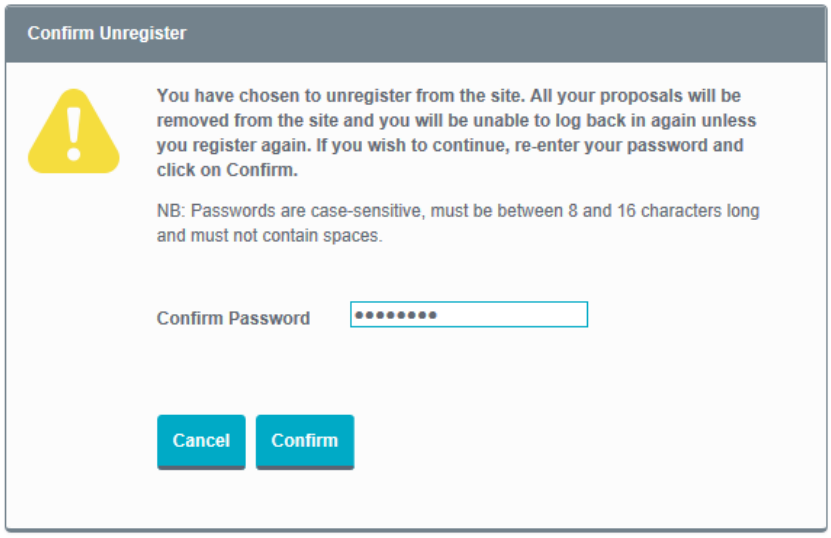
2. Enter your new password then enter it again to confirm it. Click on the **Change Password** button to save the new password.
3. We will send you a confirmation email to your email address. When it arrives, click on the confirmation link which will bring you back to ePlanning.scot. You will now be able to log in with your new password.

Unregister

If you no longer want to use ePlanning.scot, you can remove your details by **unregistering**.

Note If you are an organisation administrator, you must first transfer your administrator rights to another user or delete the organisation before you can unregister your details.

1. To unregister your details, click on the **Unregister** link in your My account page.



2. Confirm that you want to remove your details from ePlanning Scotland by entering your password in the **Confirm Password** box.

3. Click on the **Confirm** button.

Sharing

It may be helpful to involve other people in your proposals to assist with the completion of your application or submission. For example, if you are the agent you could share the application with your applicant, to allow them to view the application documentation prior to submission. Alternatively you could share the application with other professional users, such as a structural engineer or energy designer, and invite them to upload their plans, specification or Certificate of Design to the application.

You can invite other people to become eDevelopment.scot users and allow them either to view or edit your proposals, and other users can offer you the same invitation.

Professional users can create groups of users from their organisation who can automatically view proposals created by other members.

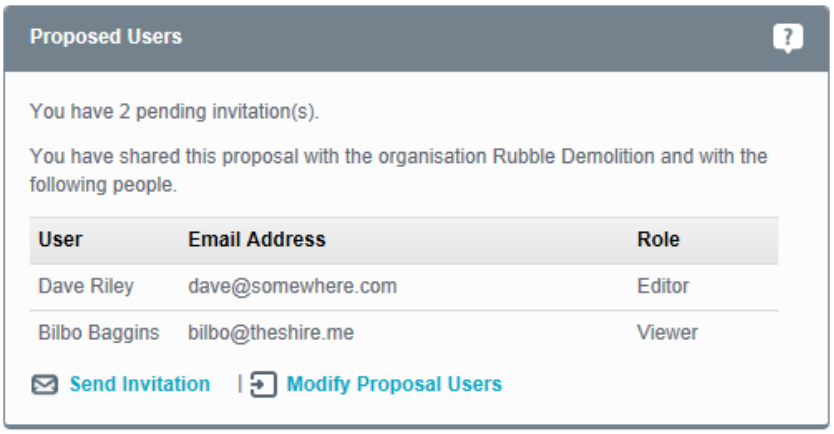
Receiving a sharing invitation

When someone sends you an invitation to view an application, we will send you an email telling you about this.

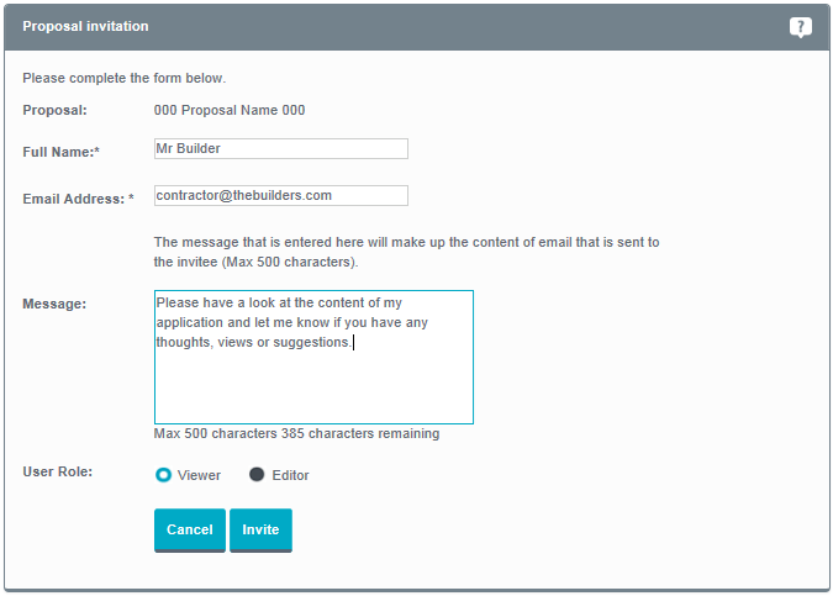
1. Login to eDevelopment.scot
2. Go to the Sharing tab and you will be asked if you want to accept or refuse the invitation. Click on **Accept**.
3. The invitation will disappear but the proposal will now be showing in “My Proposals”.

Sending a sharing invitation

Once you have created a proposal, you can invite others to view it by clicking on a proposal and going to the **Proposal Users** section in the **Proposal Summary** page. You may invite as many users as you like.



1. On the Proposal summary page click on **Send Invitation**.



2. Enter the name of the person you want to invite and then enter their email address.

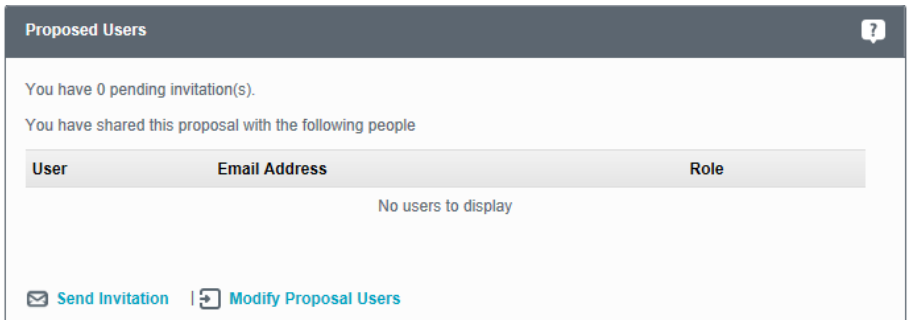
3. Type a short note in the **Message** box to explain the purpose of the invitation.

4. Select the role that you want this user to have by choosing Viewer or Editor for **User Role**.

5. Click on the **Invite** button.

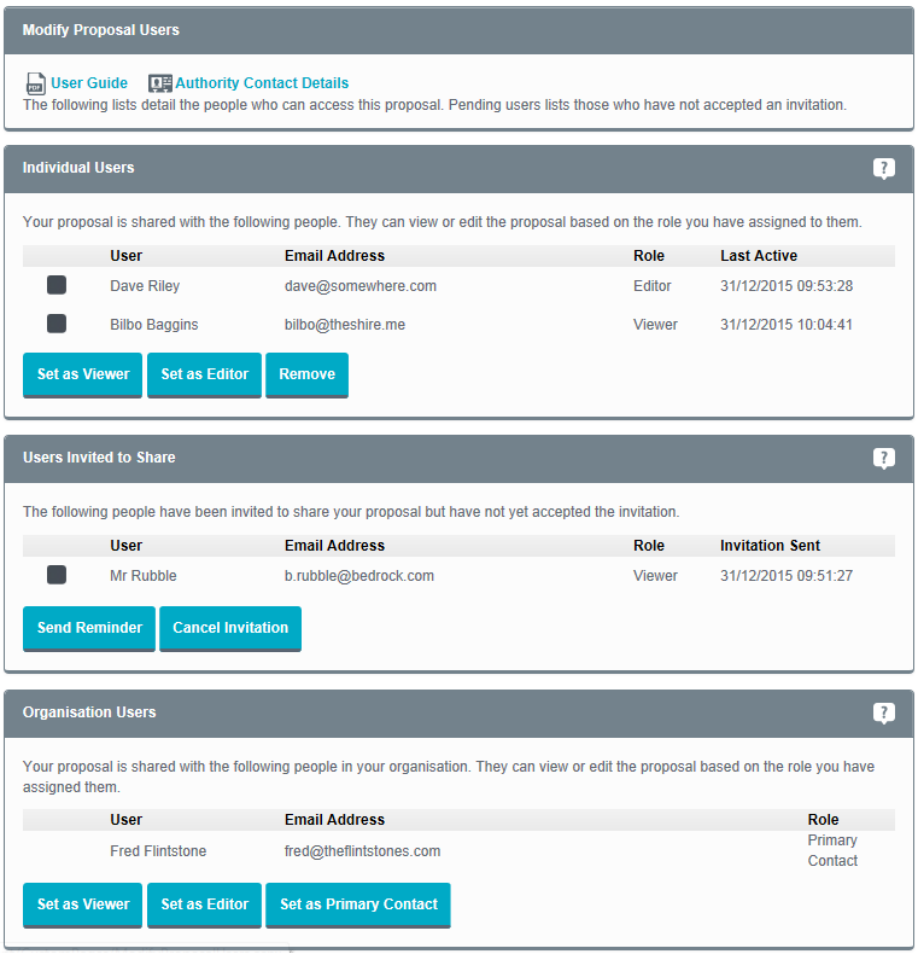
Modify proposal users

Once you have invited people to view your application, the number of pending invitations is displayed in the Proposal Users area of the Proposal Summary. You can modify the viewing rights for users who accept the invitation, and allow some of them to edit your proposal if you want to.



1. Click Modify Proposal Users on the Proposal Summary page

Invited users will be entered into the 'Users invited to share' area until they either accept or refuse the invitation.



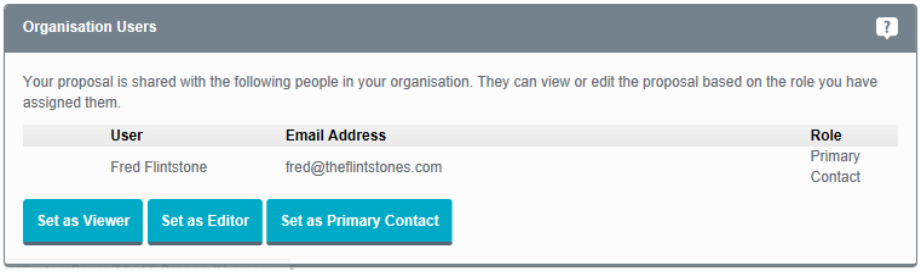
2. To change a user's rights from viewing to editing, select them and press **Set as Editor**.

3. To change a user's rights from editing to viewing, select them and press **Set as Viewer**.

4. To delete a user's ability to view your proposal, select them and press **Remove user**.

5. Users invited to share gives you a list of the users you have sent an invitation to but who have not yet accepted or refused. You can send a user a reminder email by selecting them in this section and clicking on the **Send Reminder** button. To withdraw the invitation, select the user and click on the **Cancel Invitation** button.

6. If you are a member of an organisation, your proposals will be accessible by all of your organisation's members.



These users will have one of the following roles.

- **Primary Contact** – the main user involved in the proposal. Only the Primary Contact can carry out the user roles for this proposal. If you created the proposal, this will be you unless you make another user the primary contact.

- **Editor** – a user who can work on the proposal, editing the proposal details and filling in the attached forms.

- **Viewer** – a user who is not directly involved in completing the proposal but is allowed to view the proposal for information purposes only.

7. To make another member of your organisation the primary contact, select them and click on the **Set as Primary Contact** button.

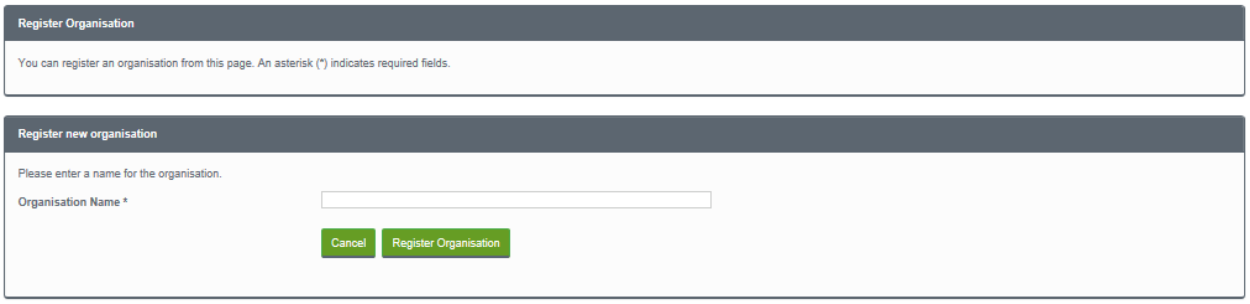
   Note When you transfer primary contact status to another user, you will automatically lose the ability to change the user status of that proposal unless you're the administrator of the organisation.

8. To allow a member of your organisation to edit the details of the proposal, select them and click on **Set as Editor**.

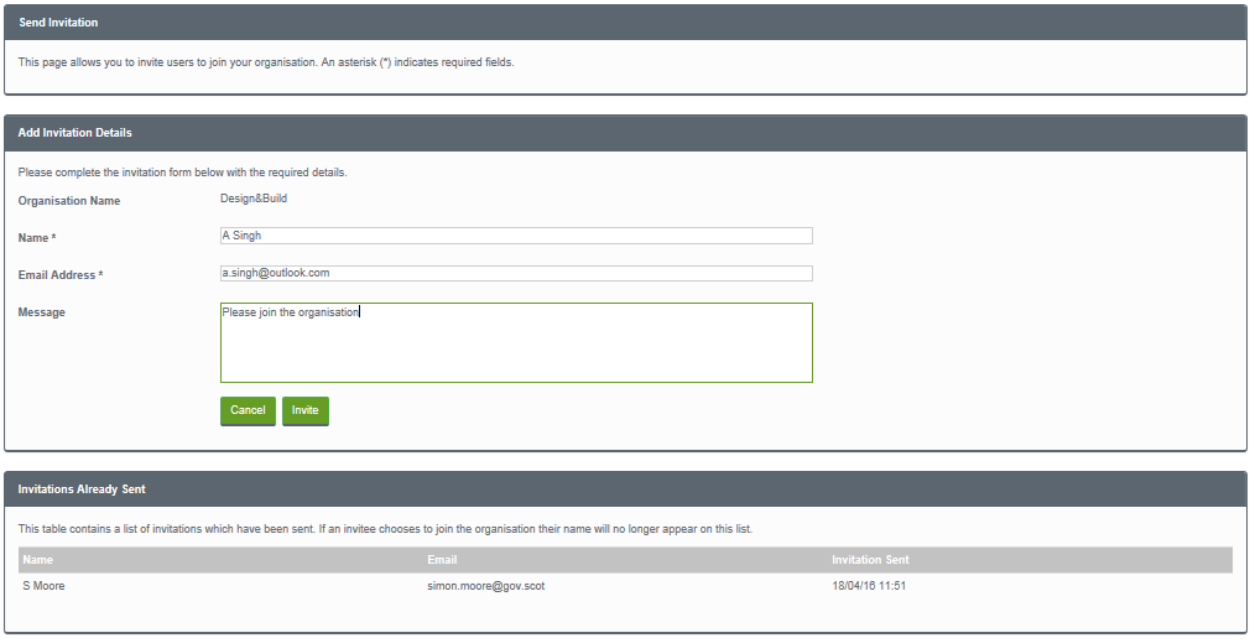
9. To restrict a member of your organisation to only viewing this proposal, select them and click on **Set as Viewer**.

Organisations

Professional users can create groups of users, known as organisations. Organisations are used to allow members to collaborate on the proposals created by their colleagues. Generally these correspond to a business organisation or group of individuals who often work together. To register an organisation on ePlanning.scot, click on Sharing in the left-hand menu then click on **Register a new organisation** on the Sharing page.



1. Enter a name for the organisation then click on the **Register Organisation** button.
2. Enter the name of the person you want to invite to join the organisation, then enter their email address.



3. Type a short note in the **Message** box to explain the purpose of the invitation.
4. Click on the **Invite** button.
5. Users who have not yet accepted or refused the invitation are listed under **Invitations Already Sent**. Those who choose to join the organisation will disappear from this list.

Joining an organisation

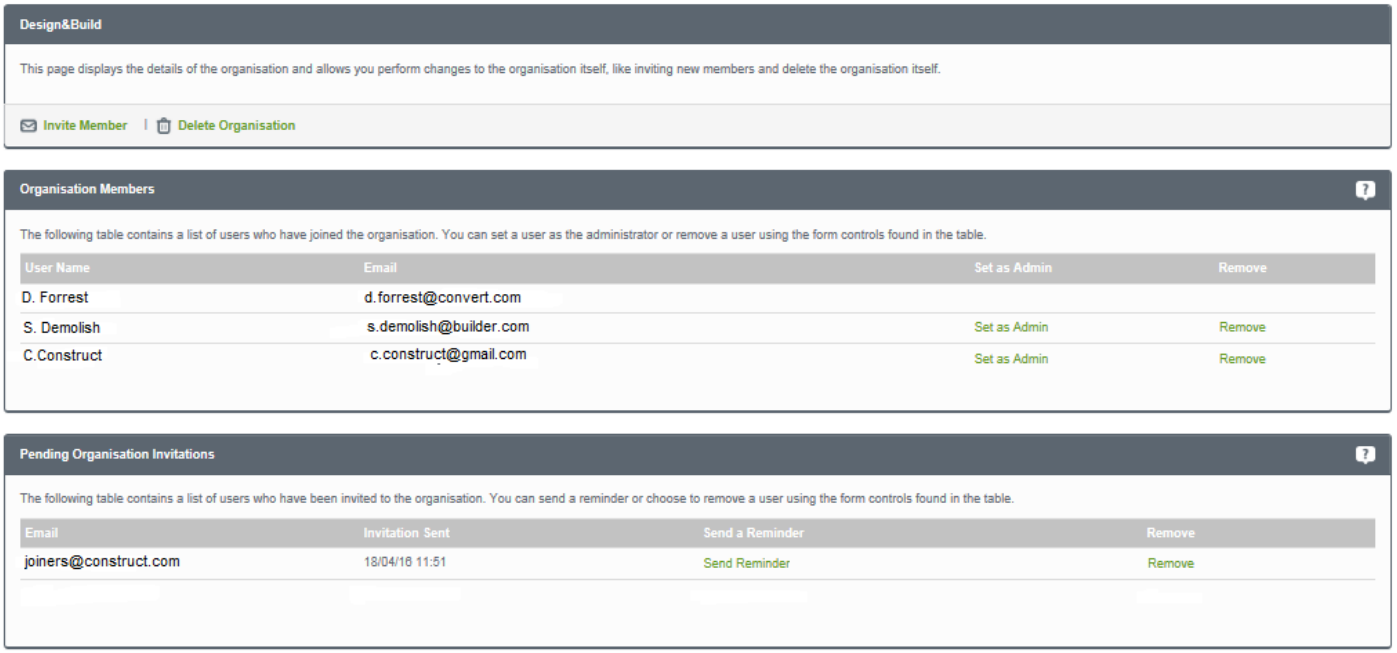
If you are invited to join an organisation, you will be sent an email. You can accept or refuse the invitation. Once you have accepted the invitation, the organisation's details will be shown in your Sharing page and all of the proposals that belong to the members of the organisation will be available in your My proposals page.

Notes

- You cannot remove yourself from an organisation. Only the organisation's administrator can do that.
- If the organisation is deleted, all users that belong to it (except the administrator) will lose access to the proposals.

Managing organisations

When you create an organisation, you are automatically made the organisation's administrator. This allows you to invite further users, remove existing users, or transfer the administrator role to another user.



1. To invite another member to the organisation, click on **Invite Member** and enter the name, email address and invitation message. Then press **Invite**.
2. To remove a user from the organisation, click on the **Remove** button next to their name.
3. To transfer administrator rights to another organisation member, click on **Set as Admin** next to their name.
4. Pending organisation invitations shows you the list of users you have sent an organisation invitation to

but who have not yet accepted or refused. You can send a user a reminder email by clicking on **Send Reminder**. Or, to withdraw the invitation, click on the **Remove** button.

5. If the organisation is no longer needed, you can delete it by clicking on **Delete Organisation**.

   When you delete an organisation, you will also be given the option of deleting the user accounts of the organisation's members. If you delete the user accounts, the proposals that were shared by the organisation become the property of only the administrator.

   If you do not take this option, the proposals go back to their original owners.

Proposals

The main purpose of ePlanning.scot is to help you create, manage and send in planning applications and appeals. All of this is done in your My proposals area.

A proposal includes a number of activities. Your My proposals area provides a number of tools to help you to work out which activities you need to do and allows you to keep track of their status until your proposal is ready to send in.

Proposal activities

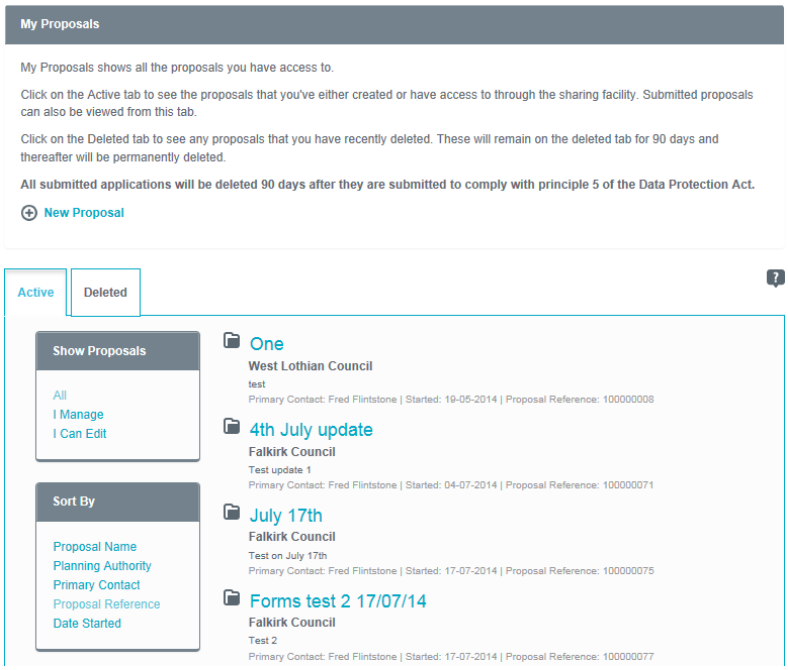
You will need to carry out some, or all, of the following activities to complete your proposal:

- **Do you need planning permission?** – decide whether your proposal needs planning permission.
- **What is the address of the proposal?** – choose which address or location the proposal refers to.
- **Fill in appropriate forms** – decide which forms you need for your proposal and fill them in.
- **Attach location plans** – decide whether you need location plans. If you do not already have access to location plans, the ePlanning.scot provides links to three accredited location plan providers.
- **Attach supporting documents** – if you need additional drawings, plans, images or reports to support your application, you can upload these and submit them with your application forms.
- **Send in certificates** – sign and send in any certificates which are needed.
- **Pay fees** – work out which fees will apply and pay the total amount.

As your proposals will stay active until you send them in, you can carry out these activities at different times until your proposal is ready. Once you have submitted your application, if you find that you need to add more supporting documents, you can do this by submitting the **Post Submission Additional Documents** form by clicking “Add Additional Forms” in the Proposal Summary.

My proposals

Your My Proposals list displays all of the proposals in which you have some involvement.



1. Under Show Proposals, click on **All** to display all of the proposals available to you. These will include your own proposals, as well as proposals that you have been invited to contribute to, either as a viewer or an editor.
2. Click on **I manage** to display only the proposals you are the primary contact for.
3. Click on **I can edit** to display the proposals you have been allowed to contribute to as an editor. You can sort the listed proposals in a number of ways.

    - **Proposal Name** – sort alphabetically by the name of the proposals.
    - **Planning Authority** – sort alphabetically by the planning authority.
    - **Primary Contact** – sort alphabetically by primary contact.
    - **Proposal Reference** – sort by the proposal reference.
    - **Date Started** – sort by the date you made your proposals (this only applies to proposals you own).

Active proposals are proposals currently in progress. When a proposal has been completed and sent in, you can delete it. You can see proposals deleted during the last 90 days in the **Deleted** area. Submitted forms will be deleted automatically after 90 days.

Creating a proposal

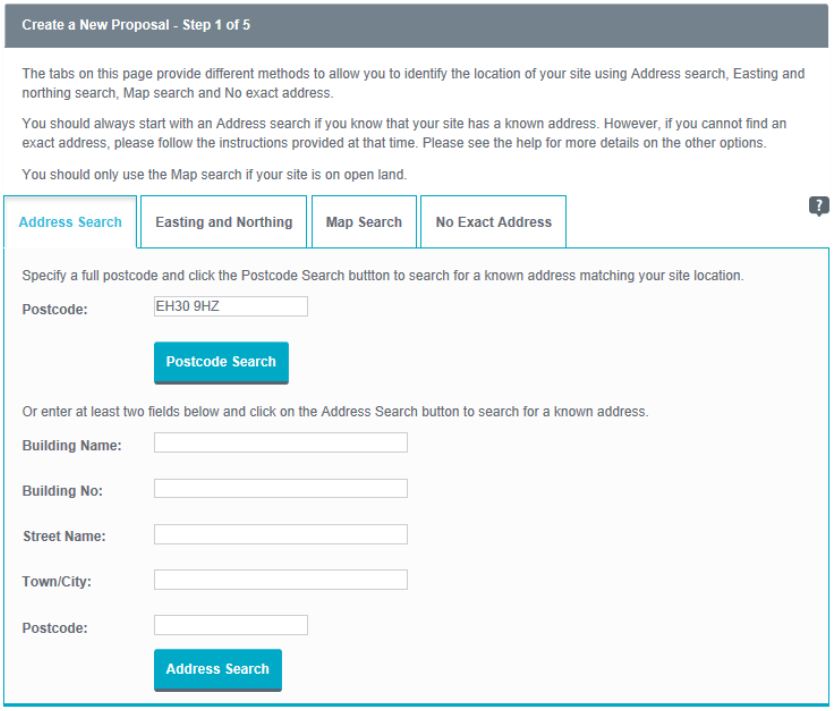
1. To create a new proposal click on **New Proposal** in the My proposals page.

2. Identify the location of the proposal site. There are four ways of doing this.

   - **Address Search** – the address of the property.
   - **Easting and Northing** – the easting and northing references of the proposal location.
   - **Map Search** – an interactive map used to find a property when you do not know the exact address.
   - **No Exact Address** – you would use this option to identify a location where you cannot find an exact address or where the development covers several addresses.

Address Search

If the address of the proposal is a building and you know the address or part of the address, you can enter that here.

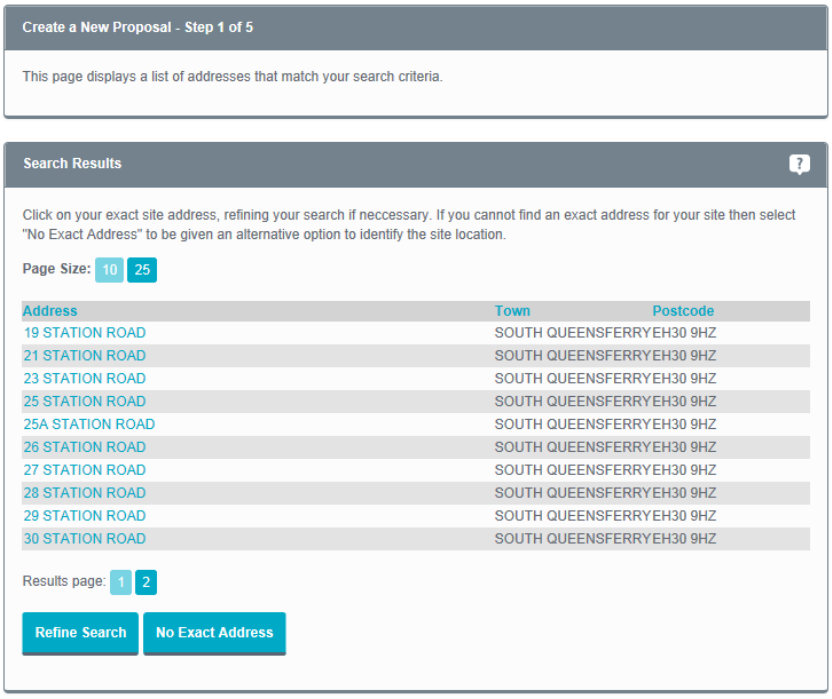


1. If you know the postcode, enter it into the Postcode box and click on **Postcode Search** to display the search results list.

2. Or enter at least two pieces of information into the Address search fields then click on the **Address Search** tab.

3. You don't have to enter information in every field, but the more information you supply the easier it will be to find the correct address.

4. Click the **Address Search** button to display the search results list.



5. If there are lots of results, you can choose how many to display on one page by clicking on a **Page Size** button. Move between pages by clicking on the **Results Page** number you need.

6. When you have found the correct address, click on its name.

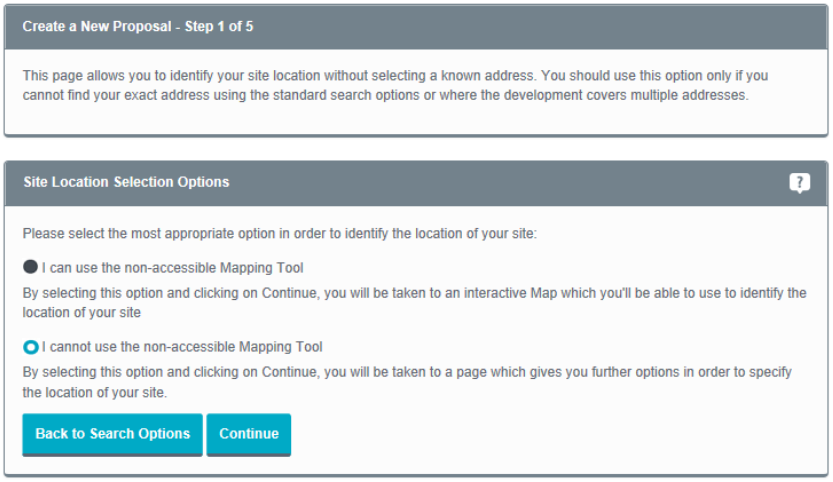
7. Review the details then click on the **Confirm Address** button (now see Confirm planning authority).

   Note If you discover a minor mistake in your address details, we recommend that you complete your proposal and then email your planning authority to report the mistake.

8. If there are too many results in the list, click on the **Refine Search** button to return to the **Address Search** page and enter more information.

9. If you cannot find a match, click on the **No Exact Address** button. If you have a broadband connection, you can select **I can use the mapping tool** to use the interactive map tool to find the address (see Map search). Click on **Continue**.

10. Otherwise, select **I cannot use the mapping tool** and click on **Continue**. This allows you to contact your planning authority to get information on the address that you can use in your proposal.

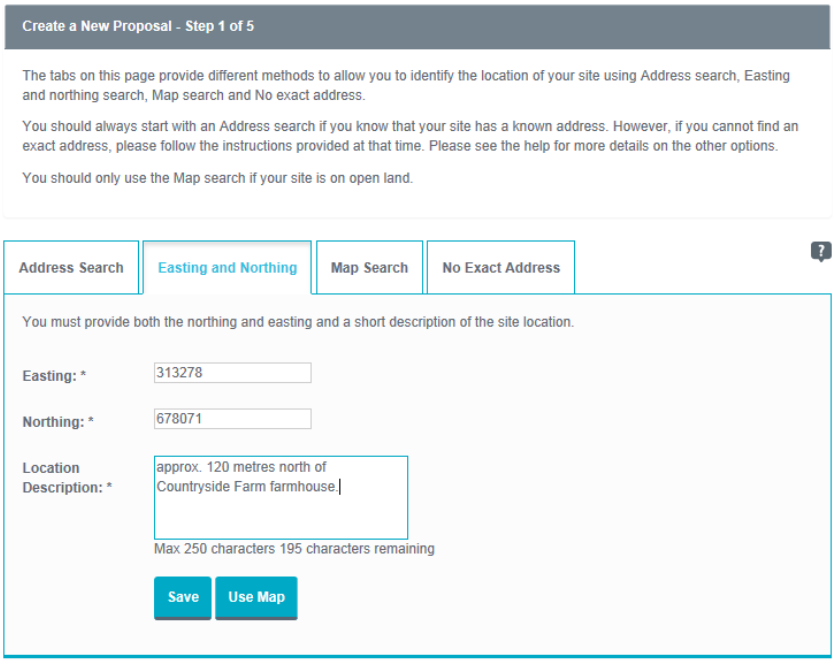


11. To contact your planning authority, select **Not Yet** and click on **Continue**. Select the appropriate planning authority and use the contact details to ask for the information you need. Either click on the **Return Later** button to leave the proposal so that you can go back to it when you have the information, or if you get the information immediately, click on the **Previous** button and continue.

12. When you have the information you need, you can return to this page, click on **Yes** and enter the information you have been given. Click on **Use as Site Location**, then click on **Confirm Address** (now see Confirm planning authority).

Easting and northing search

Eastings and northings are map references that you can use to point to a precise location. This search method is useful when you want to give a proposal location that does not currently have an address (for example, a plot of land).



1. If the easting and northing search fields are not displayed, click on the **Easting and Northing** search tab.

2. Enter the easting value (between 0 and 500000) in the **Easting** box and enter the northing value (between 500000 and 1300000) in the **Northing** box.

3. Give a brief description of the location.

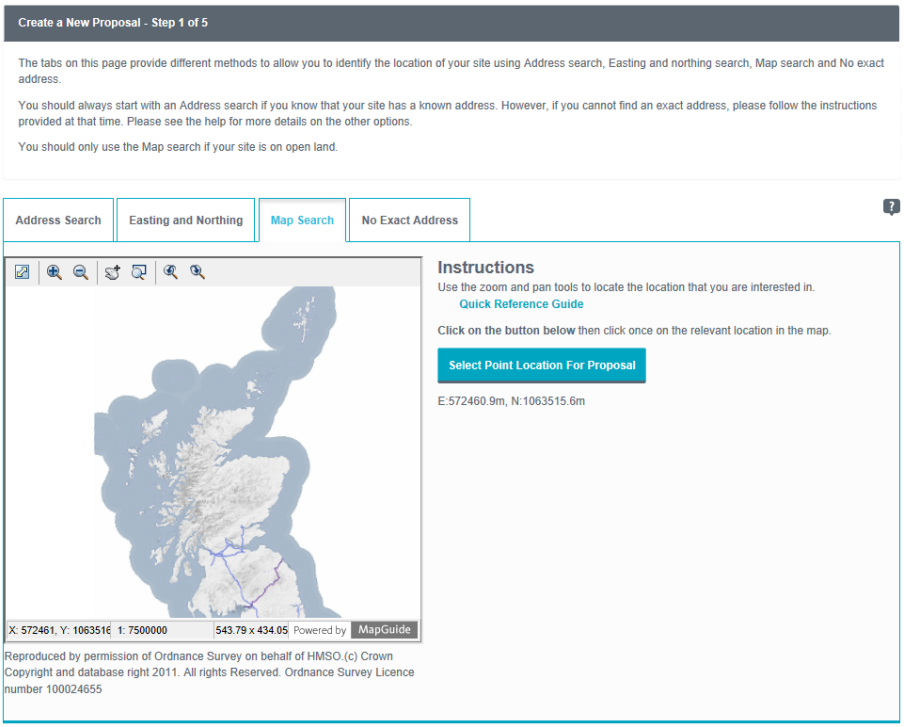
4. To use these references to define the proposal location, click on **Save**.

5. Click on the **Confirm Address** button (now see Confirm planning authority).

6. To check that these references have given you the correct location, you can view it on the interactive map. Click on the **Use Map** button (see Map search).

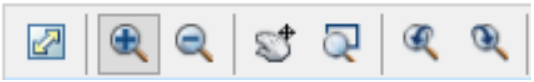
Map search

If your area of interest to the proposal is on open land, you can use the Map search feature to identify the location using an interactive map.



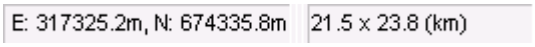
1. If the interactive map is not displayed, click on the **Map Search** tab.

2. The interactive map contains a number of tools to help you zoom in and find the correct address.



- **Initial map view** – click this to zoom the map out to show the whole of Scotland.
- **Zoom in** – select this tool then click a point on the map that you want to zoom in to.
- **Zoom out** – select this tool then click on the map to zoom out.
- **Pan mode** – to move around the map, select this then click on the map. Keeping the mouse button pressed down, drag the cursor in the direction that you want to pan.
- **Zoom to rectangle** – to zoom in on a certain area, select this tool then click and drag the cursor to draw an area on the map.
- **Previous view** – to return to the previous view, click on this tool.
- **Next view** – when you have used the Previous view tool, click on this button to go to the view that followed the one that is currently displayed.

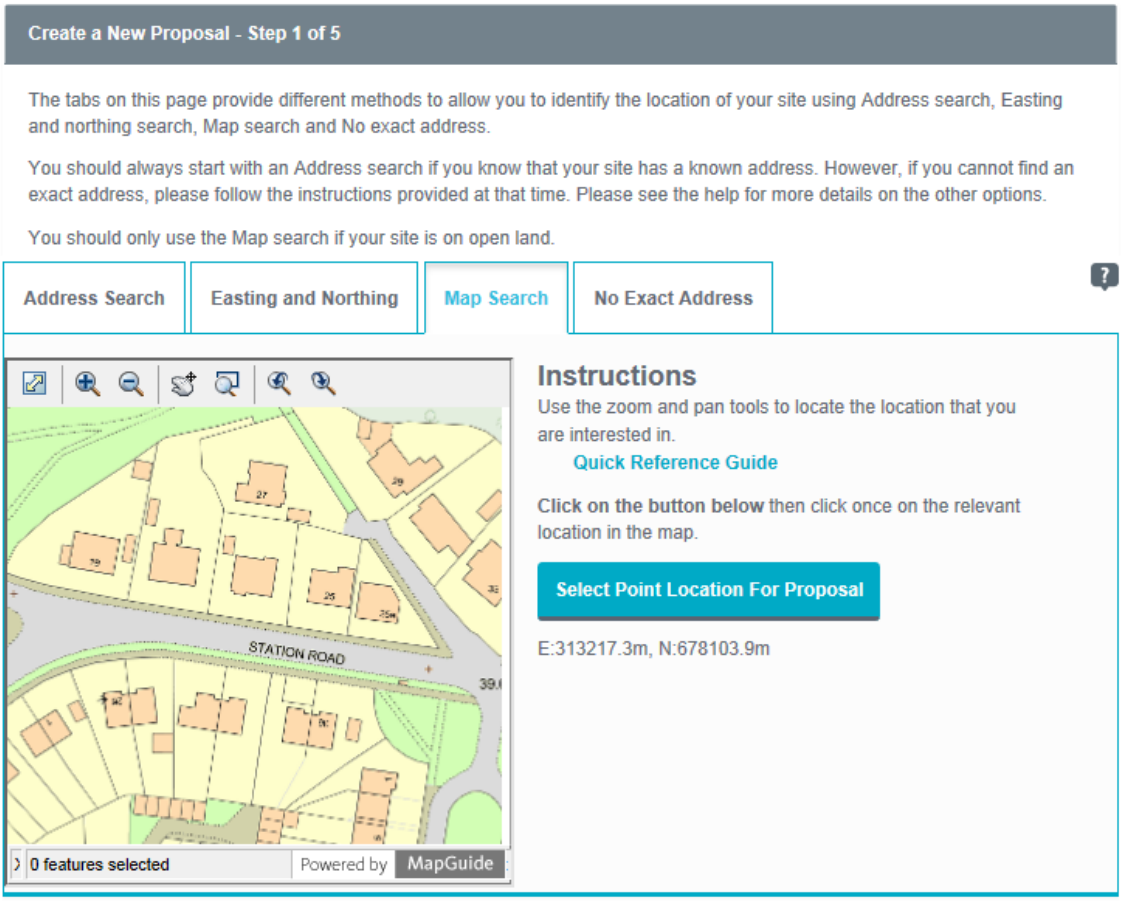
- **Select address** – to identify a location on the map that you want to use for the proposal location, select this tool and click on the desired point on the map. If you click on a building, the address will be displayed. If you click anywhere else, only the easting and northing reference will be displayed.



- **Eastings and northings reference** – displays the easting and northing reference of the place on the map that the cursor is currently pointing at.

- **Map area** – displays the dimensions of the area displayed by the map.

3. Use these tools to find the correct property. Click on the **Select Point Location for Proposal** button, then click on the map to identify the property.



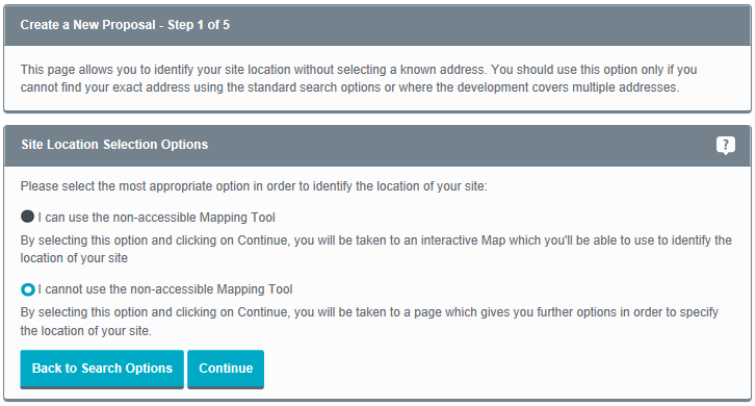
4. To use the exact easting and northing reference as the proposal location, click on **Use this point as site location**.

5. Click on **Confirm Address**.

No Exact Address

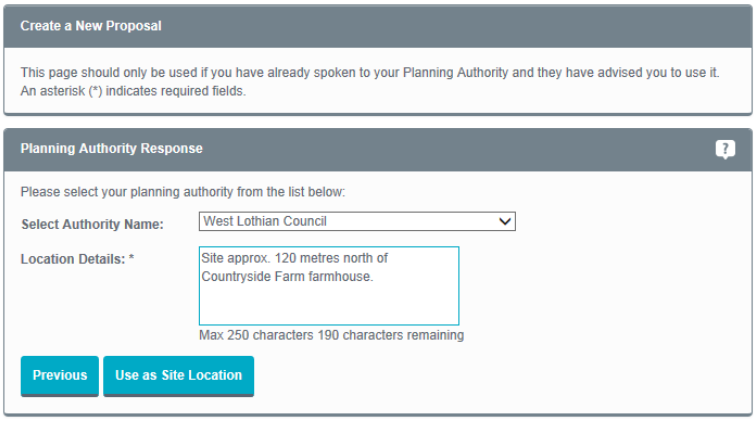
If there is no postcode address for the area that your site covers, you can enter a description of a site location here. Also, if your development covers several addresses, you can use this option to describe the site area. However, your planning authority should be consulted in these cases.

1. Select the **No Exact Address** tab and click on **Continue**



2. If your site is on open land, you can use the Map search feature to identify the location using an interactive map. Select **I can use the Mapping Tool** and click on **Continue**.
   Note If your site covers several addresses, select **I cannot use the Mapping Tool** and click on **Continue**.

3. You will need to discuss with your local planning authority and agree the description of the site location that you are going to use. Select **Yes** and click on **Continue** if you have already done this. Otherwise, select **Not Yet** and click on **Continue**. You will then be given a drop-down list of contact details for all local authorities so that you can contact them to discuss.

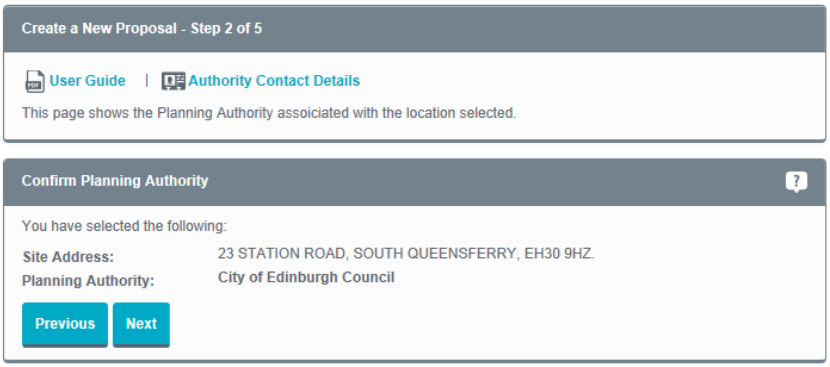


4. Once you have agreed a description of the site location with the local authority and selected **Yes** at the above stage you will be given a drop-down list of authorities. Select the authority that the site location comes under and enter your description in the box. Click on **Use as Site Location.**

5. You will be asked to check and confirm the description that you entered, click on **Confirm Address.**

Confirm planning authority

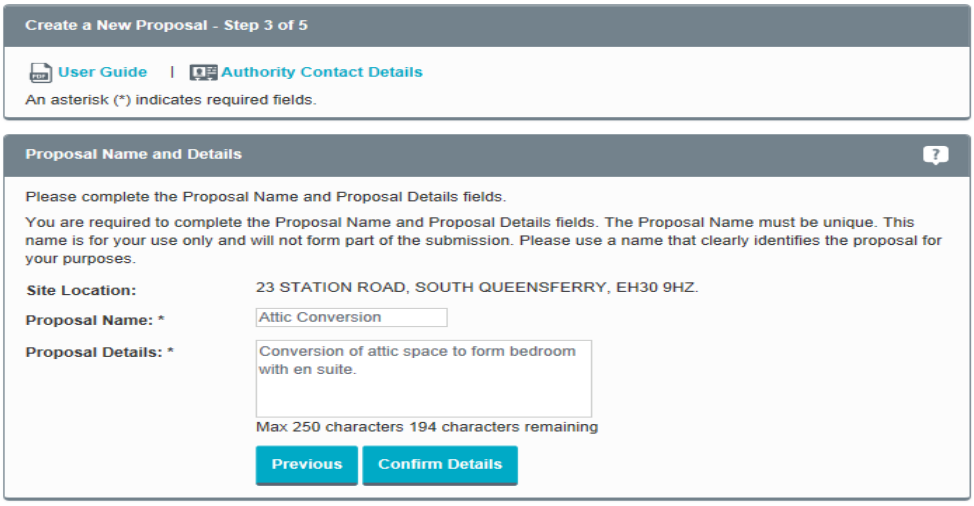
Once you have chosen the proposal location, the appropriate planning authority will be displayed.



1. Check the planning authority that is suggested.
2. If this is correct, click on the **Next** button.
3. If it is not correct, please contact the relevant authority direct. You can find the authority contact details by clicking on **Authority Contact Details**.

Name proposal

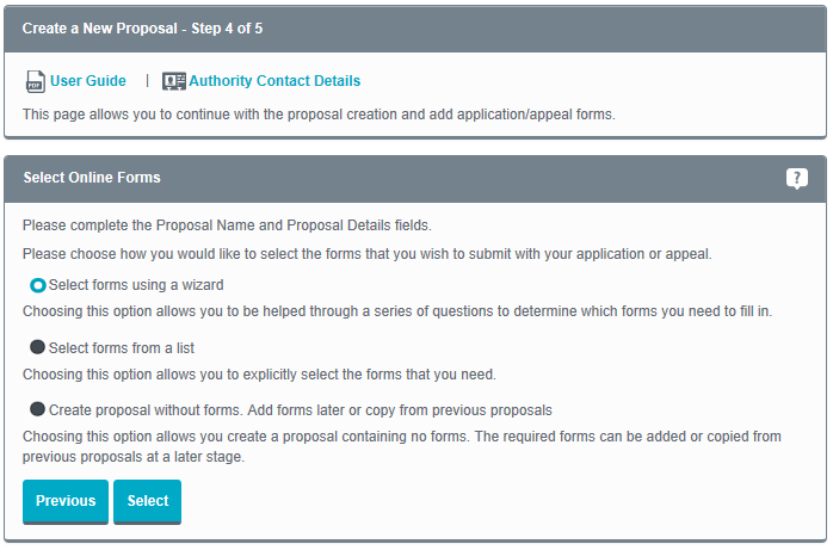
You now need to name the proposal and give it a short description. This is only for your reference on the website.



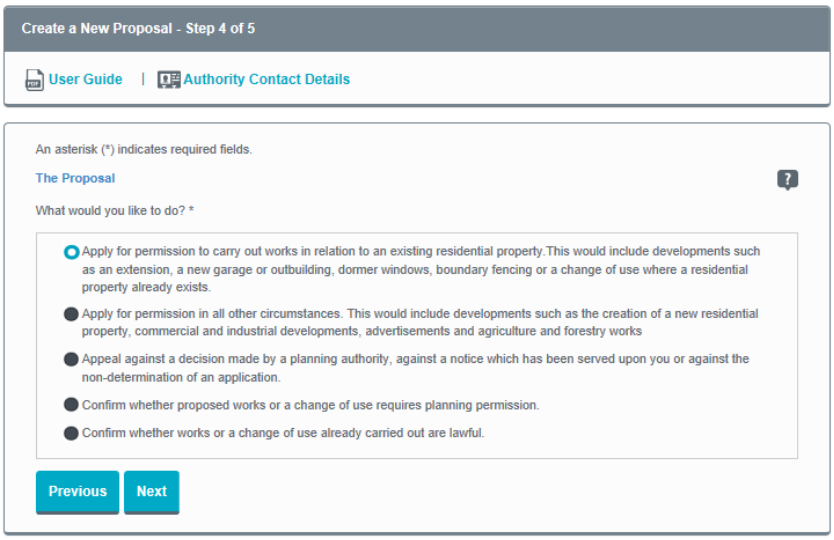
1. Enter a name for the proposal in the **Proposal Name** box.
2. Briefly describe the proposal in the **Proposal Details** box.
3. Click on **Confirm Details**.

Select forms

At this stage you can choose which forms you will need to fill in and send with the application. You do not have to do this at this stage, but you may find it easier if you do.



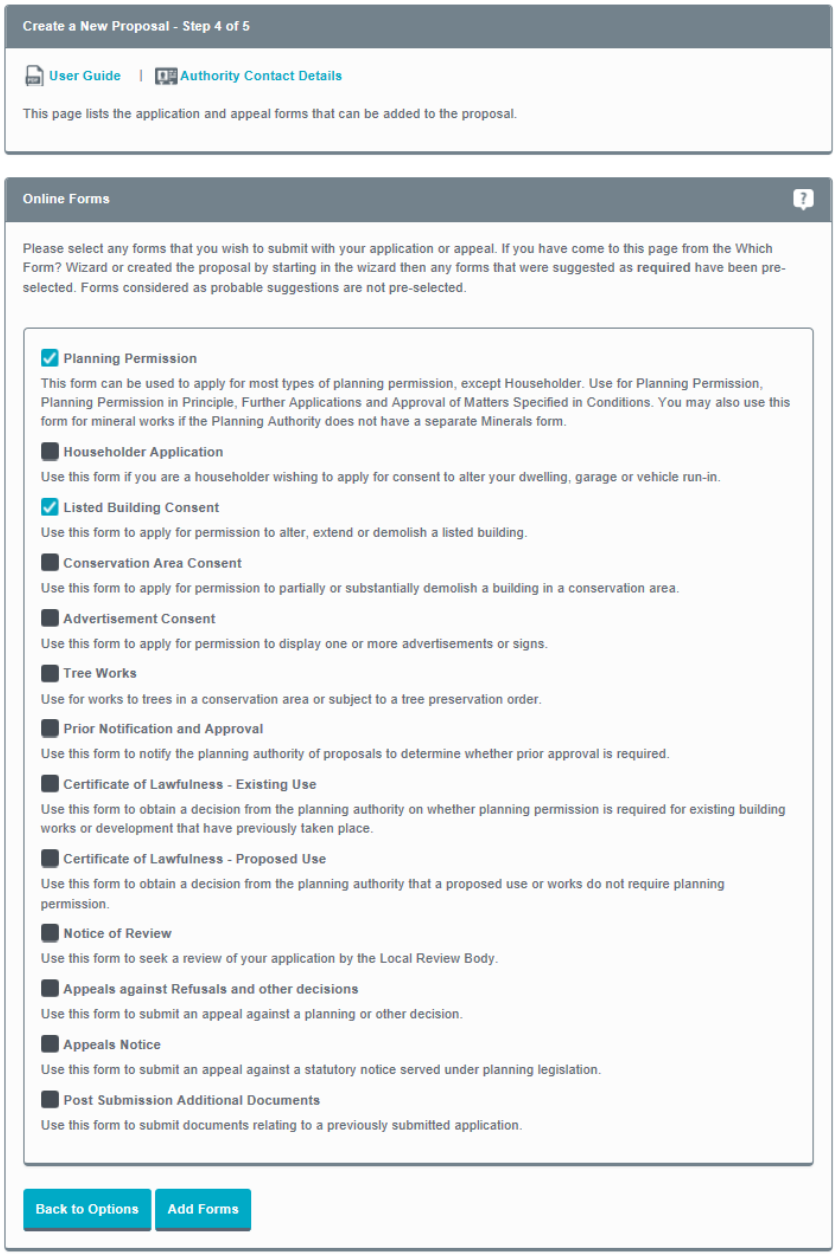
1. From the options provided, choose one of the following and press **Select**.
2. **Select forms using a wizard** – we recommend this if you are not sure about the planning process or which form you need to add.



The **'Which form?' wizard** leads you through a number of questions related to the nature of your proposal. Once you have answered the questions on each page, the wizard will recommend one or more forms you need to fill in. The 'Which form?' wizard selects only the forms you need. It does not offer forms that might be suggested as possible or optional.

You can access the 'Which form?' wizard at any time by clicking on the '**Which form?' wizard** link in the left-hand menu bar.

3. **Select forms from a list** – if you are a little more experienced with the planning process and know which forms you will need, you can choose the forms appropriate to your application direct.

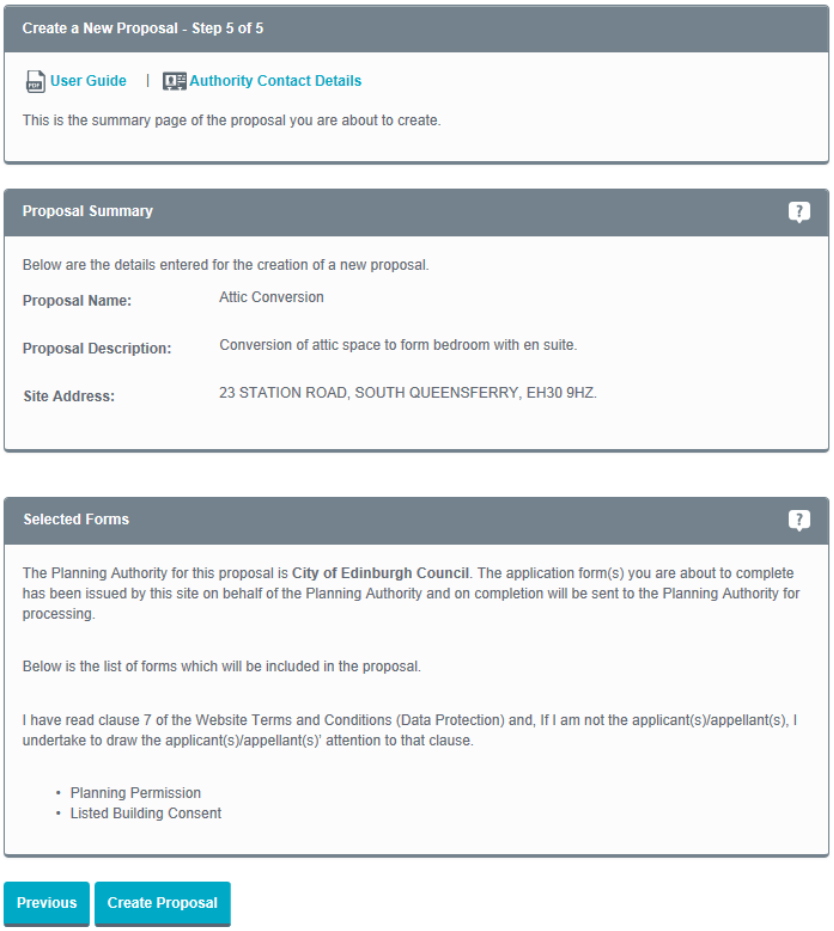


Once you have chosen the correct forms, click on the **Add Forms** button.

4. **Create proposal without forms** – instead of adding the forms now, you can choose to skip this step. You can then add the forms later or copy them from a previously created proposal by choosing this option.

Create proposal

The final step in creating your proposal is to check the proposal summary and enter the proposal into your My proposals area.



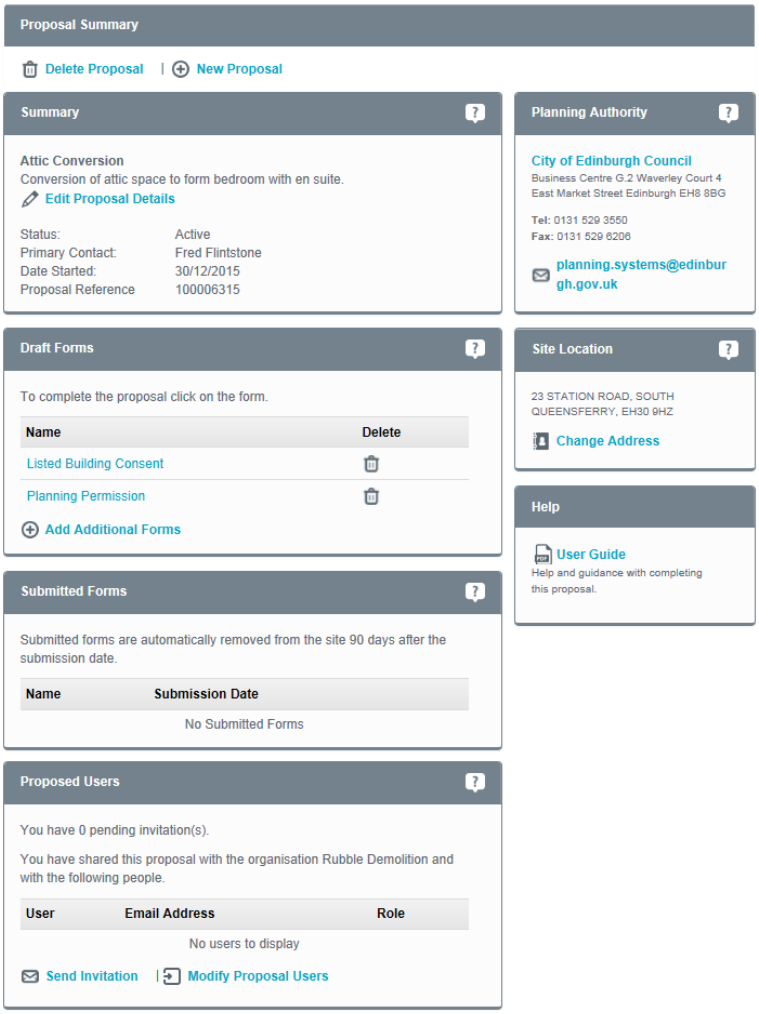
1. Read carefully through the proposal summary and the list of selected forms and make sure that these are accurate.

2. If you need to make any changes, click the **Previous** button and step back through the process to the step that needs changing.

3. When you are happy that the proposal details are correct, click on the **Create Proposal** button.

Completing a proposal

In **My proposals**, click on a proposal name to view the **Proposal Summary**.



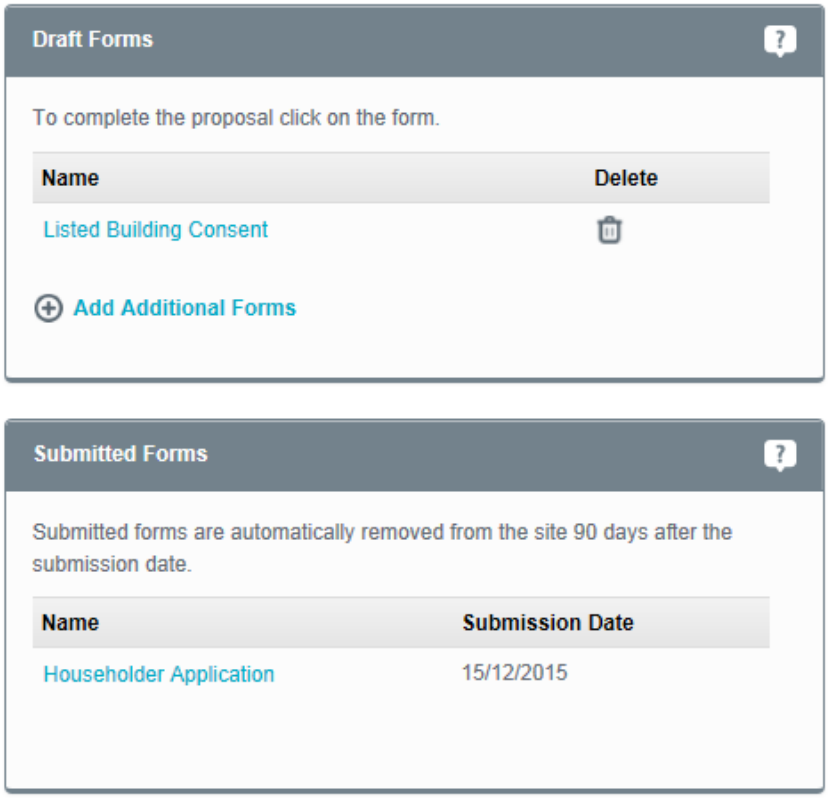
In this area you can:

- fill in the application forms you selected when you created the proposal
- **add** new forms or copy existing ones
- review forms that you have already sent in
- edit the **proposal details**
- edit the proposal **site location**
- **invite** people to view the proposal and manage their roles (see Sharing), and
- contact the relevant **planning or appeals authority**.

Application form

To send in your proposal you need to complete the relevant form(s). This process is likely to include providing supporting material such as plans/drawings, providing certificates of design or construction and, where appropriate, paying the fee.

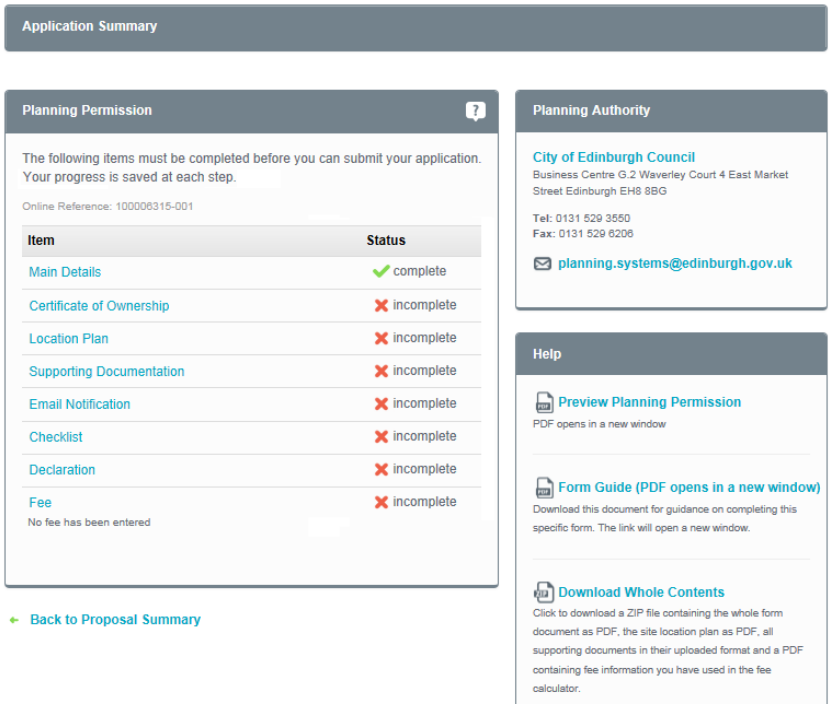
If you have not filled in a form fully, it will be listed in the **Draft Forms** section of the **Proposal Summary** page. You can delete any draft form by clicking the **Delete** button.



Forms which you have completed will be listed in the **Submitted Forms** area. These forms are kept for up to 90 days during which you can refer to them for information or copy them for use in other applications. 90 days after you have sent a form in it will be deleted from your application. **You should note that 90 days after you have sent a form it will be deleted from your application.**

Completing a form

1. In the Draft forms area of the Proposal summary click on the name of the form to access the **Application Summary** page.



2. Each section of the application has a status displayed. You need to fill in each section and change all of the status indicators to ticks. Remember that you do not have to fill in an application all at once, you can log out and return to fill more of it in at a later time.

Each form has a number of different sections. You need to fill in each of these sections. Depending on the type of form, these may include the following:

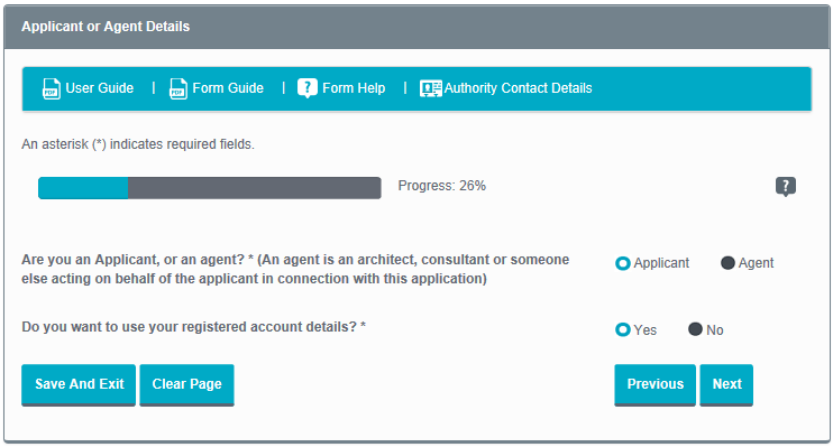
- **Main Details** – is the main body of the application form where most of the questions are asked.
- **Certificates of ownership** – a series of questions will determine which certificates of ownership you need and allows you to sign them electronically.
- **Location Plan** – as covered in the previous section of this guide, all applications require a location plan.
- **Supporting Documentation** – this is where you can upload electronic copies of all your drawings, photos, statements or any other documents to support your application.
- **Email Notification** – If you want a client, colleague or neighbour to get an automated email when you send in your application, this is where you provide their email address.
- **Checklist** – is a list of items and activities which you need to have done before the application

is ready to be sent to the authority.

- **Declaration** – allows you to review the application and sign an electronic declaration that it is accurate and a true representation of the information that you want to provide.
- **Fee** – the fee calculator will ask a number of questions to help you find what the fee for your application is. If you know how much the fee is, you do not need to use the calculator.
- **Payment Method** – this section only appears if there is a fee to pay. This is where you declare how you want to pay for your application when you send it in.

Main Details

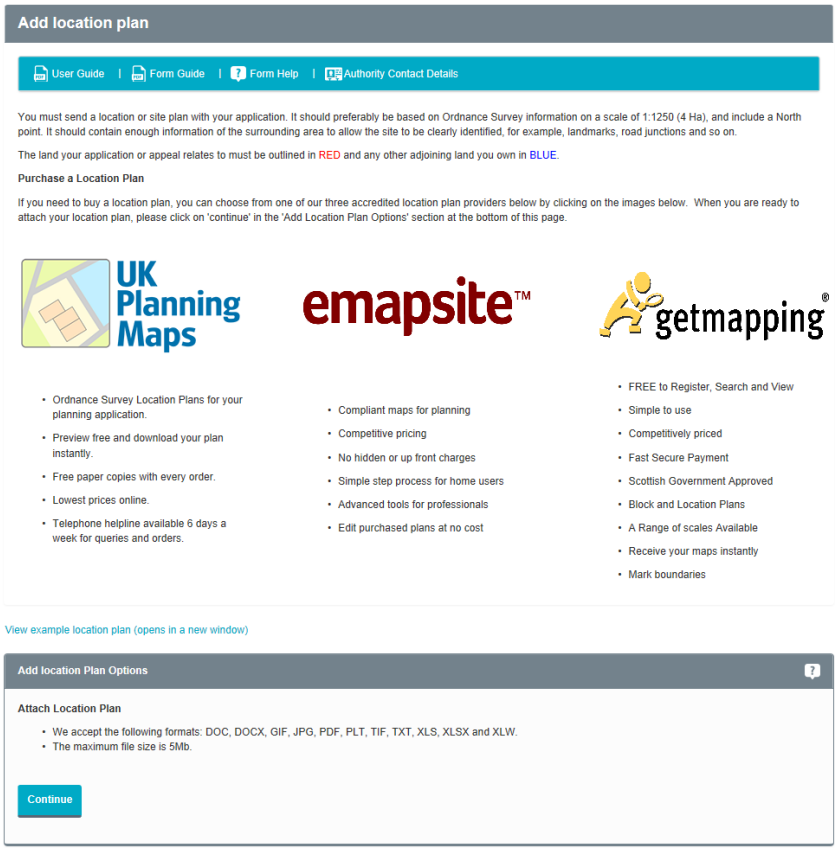
1. Click on the title of the section to begin filling out the form.



2. Navigate through the form using **Next** and **Previous** buttons, answering the questions (if there are 'mandatory questions' on the page you will not be able to go any further until you have answered these). The **Progress bar** at the top shows how far through the section of the form you are.
3. You can clear the current page by clicking on the **Clear Page** button.
4. You don't have to fill in a form all in one sitting. You can save what you have done so that you can come back to it later by clicking on **Save and Exit**.

Location plan

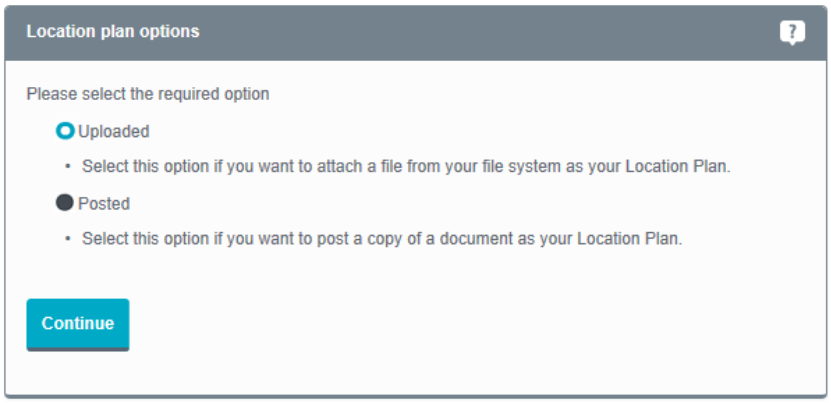
You have to send a location plan as part of your application because it shows clearly the property that is covered by the proposal. If you do not already have a location plan, we recommend that you buy a location plan from one of our accredited suppliers. The three suppliers that are listed on the ePlanning.scot portal all provide an efficient and professional service. You will be able to choose the size of plan to suit your application, mark it up with the relevant information and save it to your computer. Once you have bought and saved your location plan, you are ready to attach it to your application.



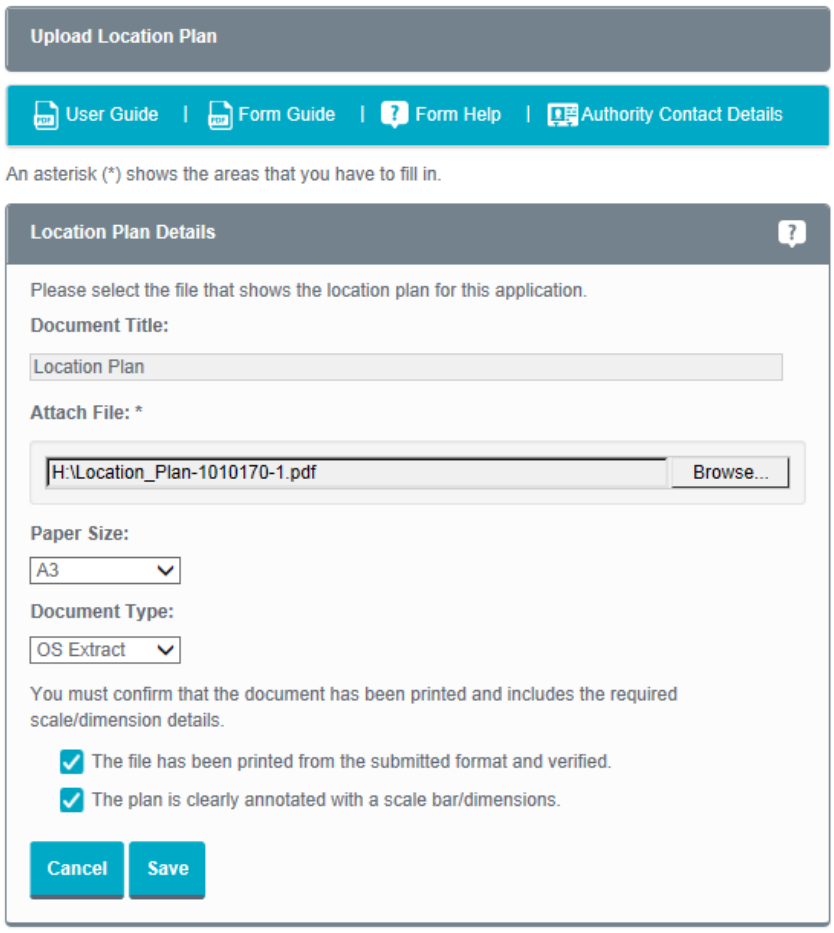
1. Click on **Location Plan** in the Proposal summary. If you need to buy a location plan, you will find that we have provided three accredited suppliers for you to choose from.

Attach location plan

1. To attach your location plan to the form, click on the **Continue** button in the Add Location Plan Options section of the Add location plan page.



2. Click on whether you want to **Upload** an electronic copy of the location plan or **Post** in a hard copy.



3. To upload the plan, click on the Browse button to find the file in your computer. Select the paper size of the plan and what kind of document it is. It is important that these details are correct. Tick the boxes to show that you have printed the file and checked it contains the correct scale and dimension details, then click on the **Save** button.

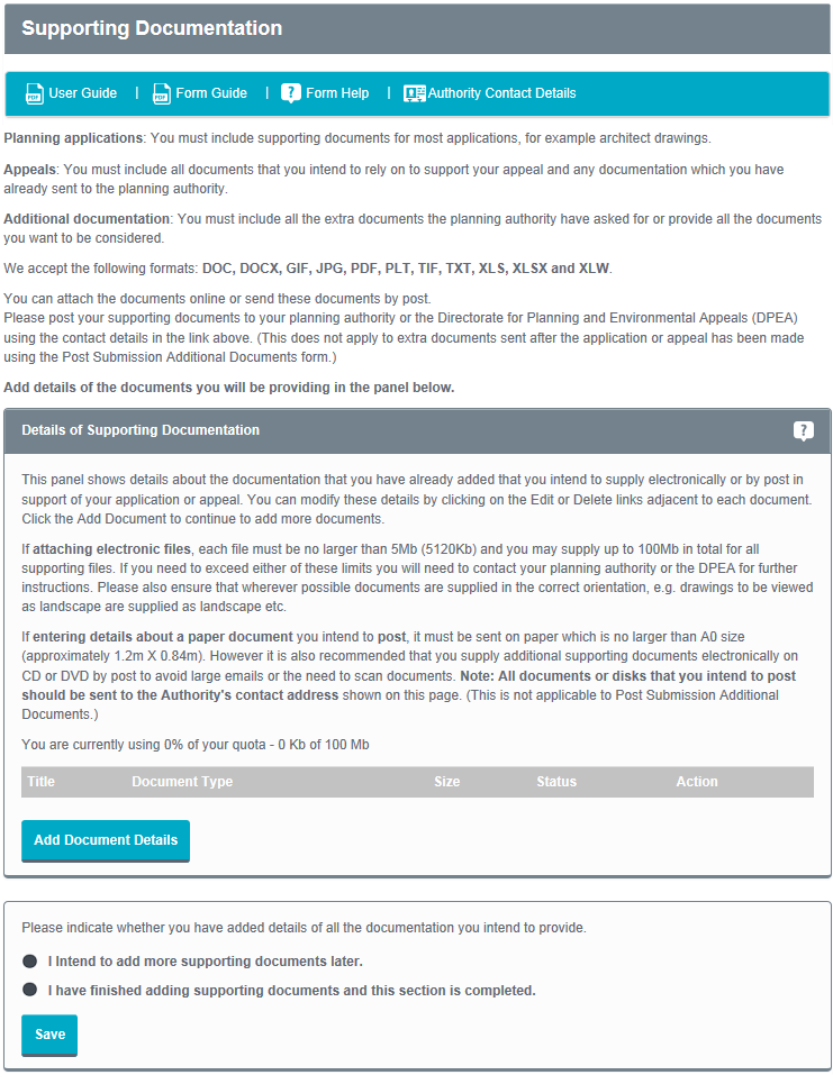
4. To show that you are going to post a hard copy of the plan, enter the document title, select the paper size of the plan and what kind of document it is. It is important that these details are correct. Tick the check box to show that you have followed these instructions, then click the **Save** button.

5. Once uploaded, you can view or remove a location plan by clicking on **Location Plan** in the Application summary.

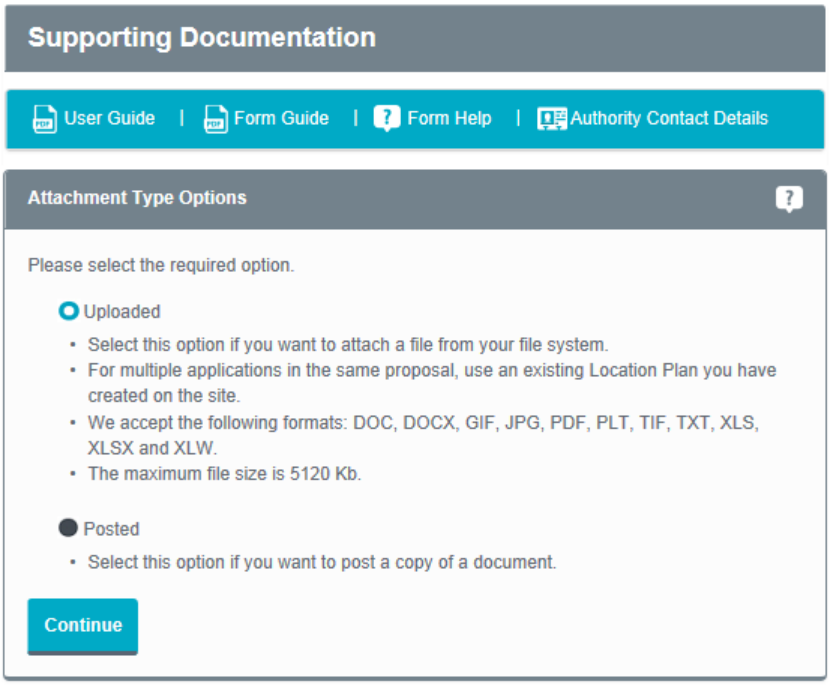
Supporting Documentation

You may want to upload or post other documents to support your application (for example, site photographs or architects' reports). While we recommend that you upload electronic copies of documents, the contact details of the planning authority are provided on the application summary page of your application.

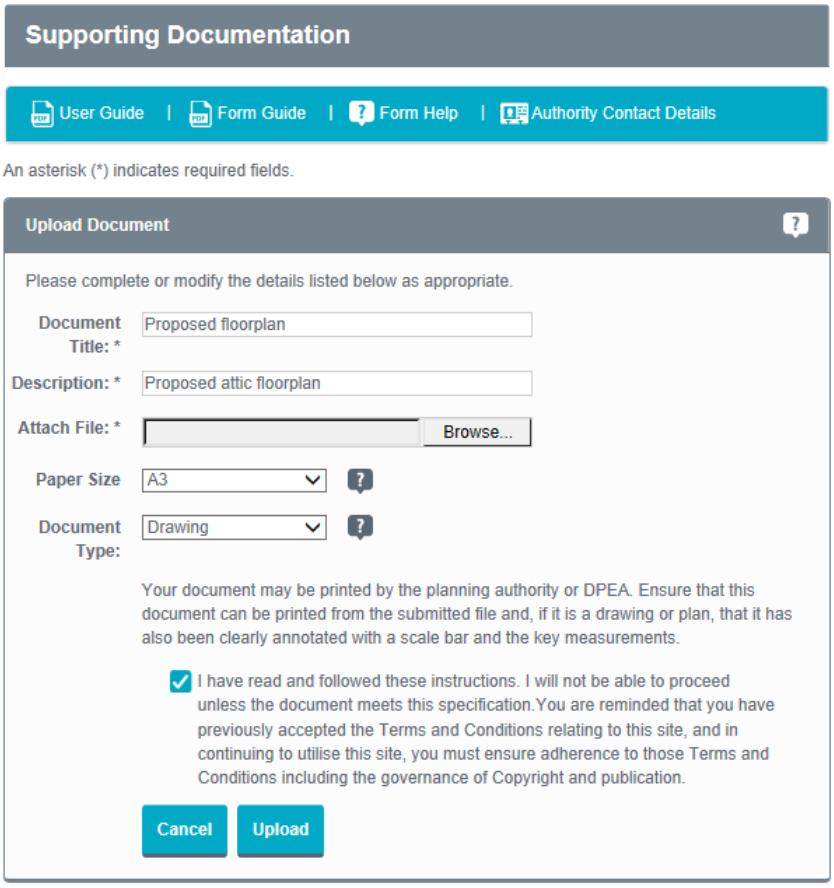
1. To upload or make a record of what you are going to post, click on **Supporting Documentation** in the Application summary page.



2. Click on the **Add Document Details** button.



3. Choose whether you are going to upload or post your document. If you are posting the document, the only change to the steps below is that there will not be an Attach File **Browse** button. **Note**, paper documents might be able to be posted on CD/DVD but we recommend speaking with the relevant Authority first.



4. Enter the **Document title** and a short **Description**.

5. Click on the **Browse** button to find the file on your computer.

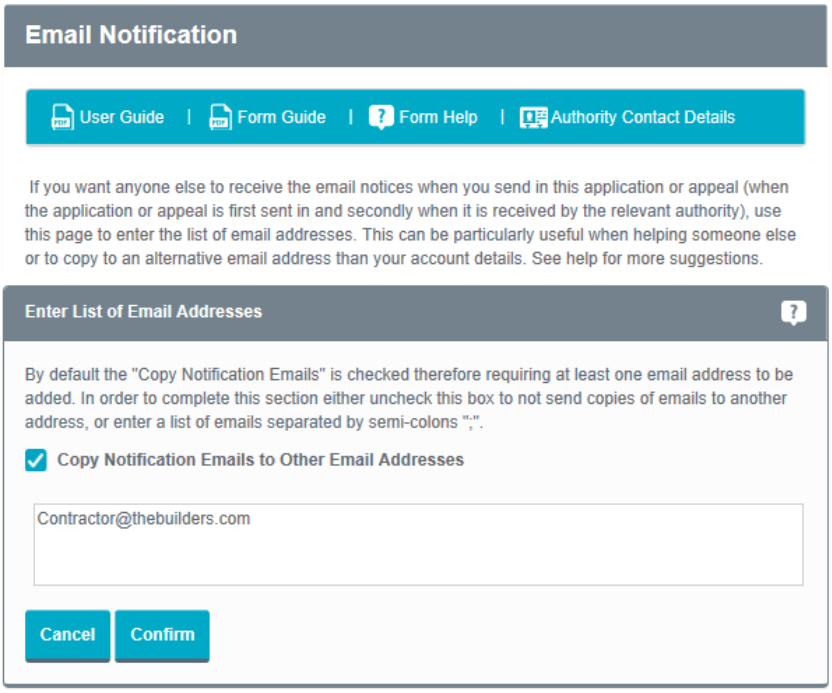
6. Select the paper size of the document and select what kind of document it is. It is important that these details are correct. Tick the box to show that you have followed these instructions, then click on the **Upload** button.

7. Once documents have been uploaded or marked for posting, you can edit or delete them by entering the Supporting Documentation page again from the Application summary.

Email Notification

If you want to let people know when you send in this application, you can enter a list of email addresses in the Email Notification tool.

1. Click on Email Notification in the **Application and appeals summary** page.



2. Enter a list of email addresses in the box provided. Separate each address with a semicolon (;).

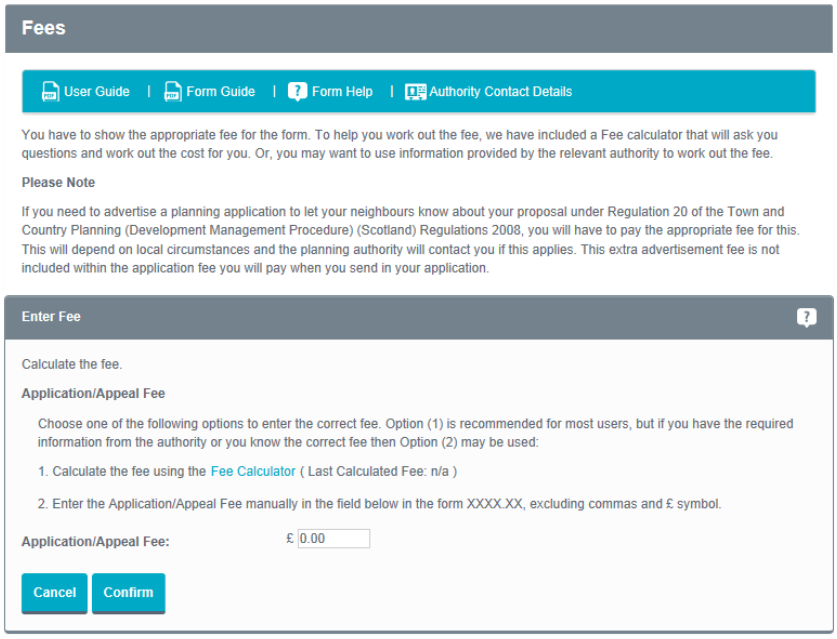
3. The checkbox to send the emails is ticked by default, once you have added all the email addresses you want, click on the **Confirm** button.

4. If you do not want to send any email notices, remove the tick from **Copy Notification Emails to Other Email Addresses** and press **Confirm**.

Fee

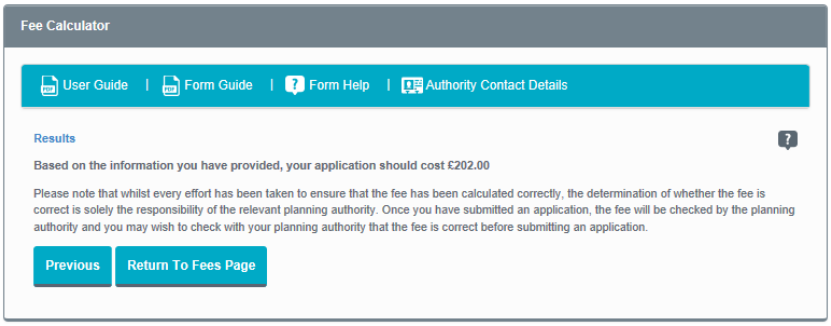
The Fees part lists the chargeable parts that apply to your application, helps you to work out the total due and allows you to enter a fee. You can use the fee calculator to work out what you need to pay. **Note** Not all applications or appeals have a fee. If this is the case, this option will not be present.

1. Click on **Fee** in the Application summary.



2. To work out the fee that you need to pay, click on **Fee Calculator** (this is also available direct from the left-hand menu). Or, if you already know what the fees are, you can type them into the box.

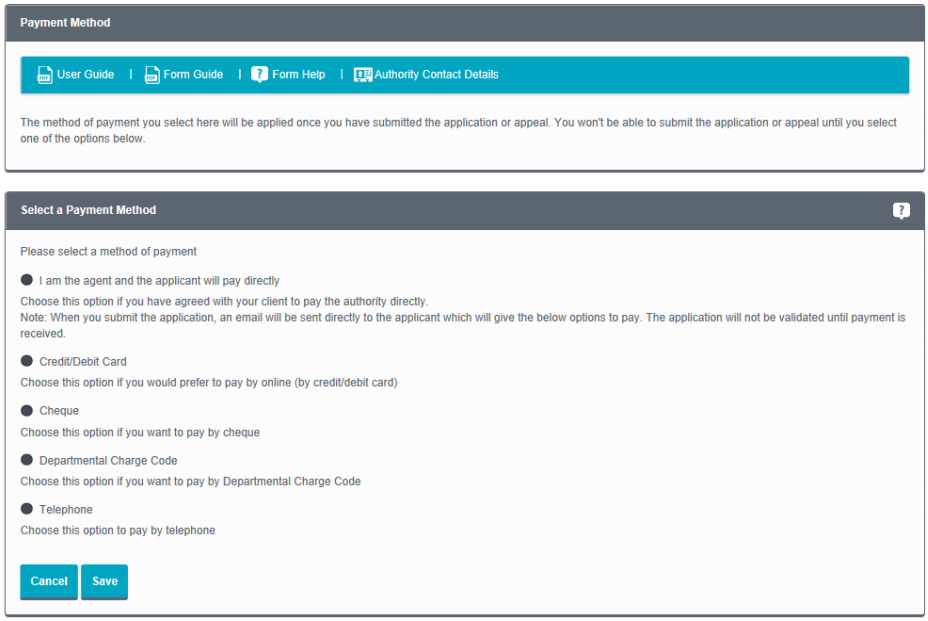
3. Follow the wizard through, answering all of the questions to arrive at the charges that apply. Click on **Return to the Fees Page** and you will find that the fee amount is in the Application/Appeal Fee box.



4. Click on the **Confirm** button.

Payment method

In the Application summary page, click on **Payment Method**.



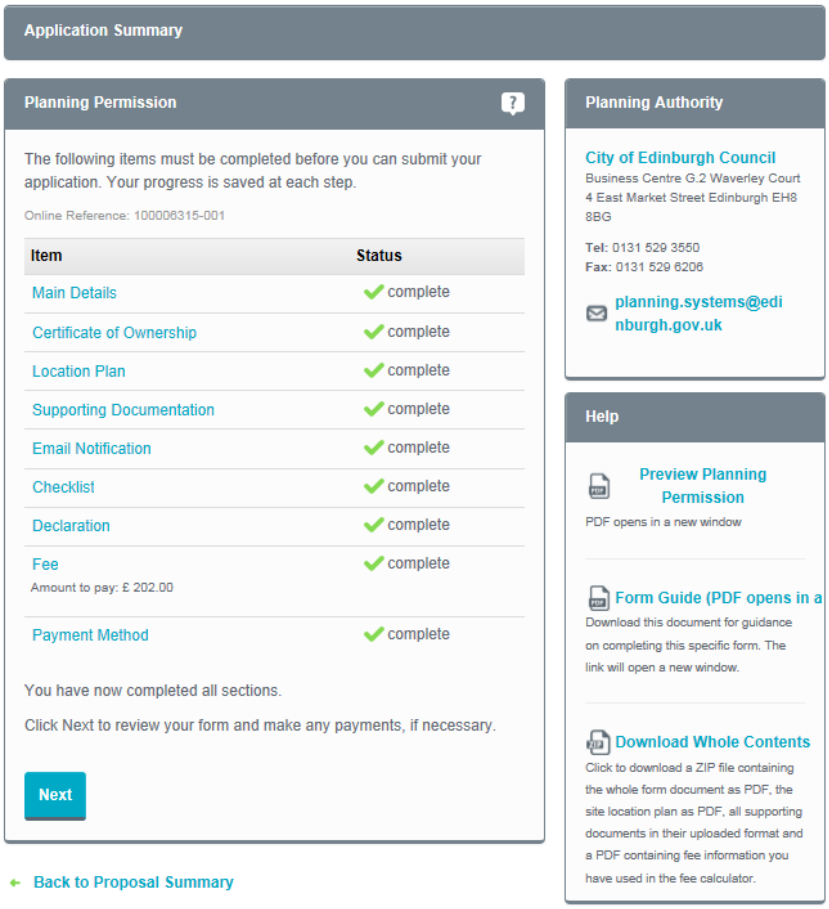
Choose how you want to pay the fees. Your application or appeal will not be processed until payment is received.

- **Pay Direct** – Client to pay option. (Only available on applications being completed as an Agent)
- **Online (by Credit/Debit Card)** – pay using a credit or debit card when you send in the application. In selecting this option, you will be taken to your local authority's payment engine in order to make payment. You will be need to return to ePlanning to submit your application.
- **Cheque** – send a cheque to your local authority. You will be asked to enter details of your cheque (i.e. cheque number, dates, etc.) before submitting the application.
- **Departmental Charge Code** – for local authority departments to register an internal payment.
- **Telephone** – make a payment over the phone. You will be asked to enter details of this payment before submitting the application.

Note Your planning authority may not offer all these options.

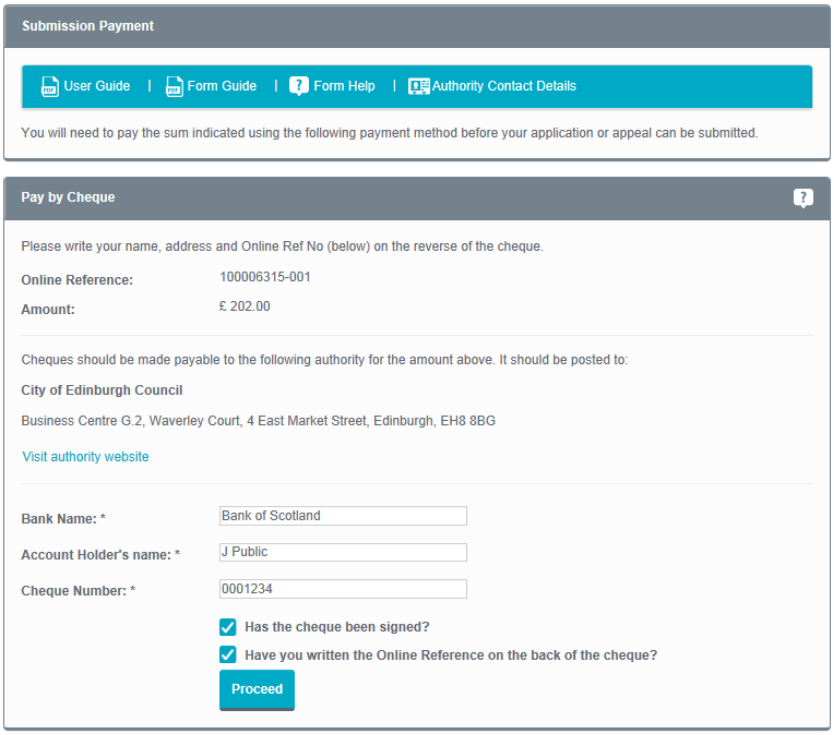
Sending in the application

1. Once you have filled in all of the parts of the application or appeal, you have a new option to continue to the next page and send in the application.



2. Click on the **Next** button. Review the Submission summary page. If you are happy that the application is as you want it, click on the **I Accept** button and then the **Submit** button.

3. If you chose to pay any fee online you will be asked to enter your payment details on the following screen. If you chose to pay by cheque, phone or by departmental charge code, enter the details in the Submission payment screen



4. Once you have filled in the relevant sections, click **Proceed.**

5. If you chose to send email notices to other users, they will be sent an email now.

6. The completed **Submission Summary Page** displays all of the relevant information about your application or submission. You can view the application in PDF format by clicking **View Form PDF (opens in a new window).**

7. Your application or submission will be kept on the system for 90 days after you send it.

   To keep a copy for your records, click **Download a copy of my submission** and save the file to your PC. Or, you can get a printed copy of the summary by clicking **Printable Version (opens in new window)** and click Print.

Adding documents after submitting an application

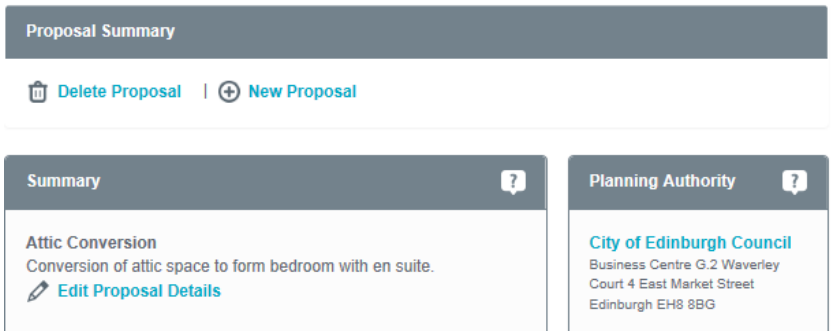
If you find that you need to add documents after you have sent your application, or you have been asked to replace a document. You can do this from the proposal you have already created.

1. In the Draft forms area of the Proposal summary click on the **Add Additional Forms** link
2. Select the option **Add from a list of standard forms** and click **Continue**.
3. Scroll down the list and select the Post Submission Additional Documents form and click the **Add** button.
4. You will be returned to the Proposal summary page once you have added the Post Submission Additional Documents form. You will now have the form in the Draft forms section of the Proposal summary page.
5. Click on this form to access the Application Summary page.
6. Each section of the application has a status displayed. You need to fill in each section and change all of the status indicators to ticks.
7. Please refer to the notes in the section above on how to add supporting documents.

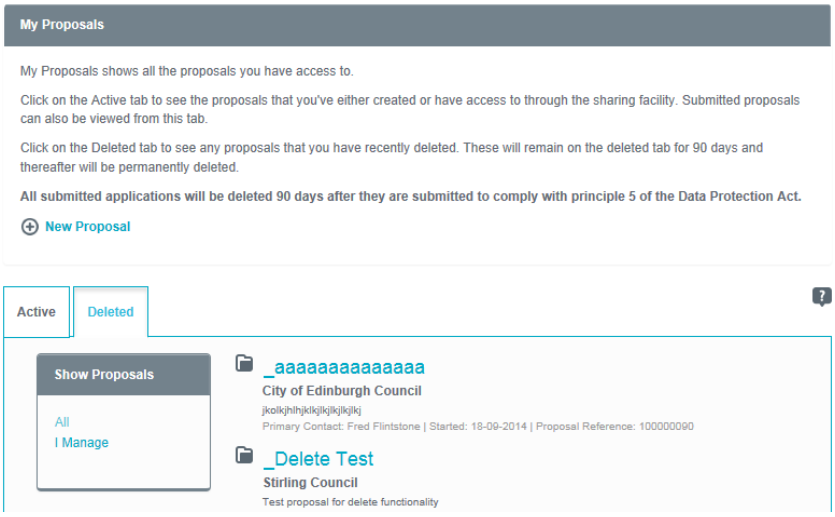
   Remember that you do not have to fill in an application all at once, you can log out and return to fill more of it in at a later time.

Deleting proposals

1. If you no longer need a proposal, you may decide to move it from the Active list in the My proposals page to the Deleted tab. This removes the proposal, but allows you to refer to it for up to 90 days after it was deleted. To do this, click on **Delete Proposal** in the Proposal summary page.



2. To view deleted proposals, click on the **Deleted** tab in the My proposals page.



3. Under Show proposals, click on **All** to display all of the proposals that were available to you or click on **I manage** to display only the proposals for which you were the primary contact.

4. You can sort the deleted proposals in a number of ways

   - **Proposal Name** – sort alphabetically by the name of the proposals
   - **Planning Authority** – sort alphabetically by the planning authority
   - **Primary Contact** – sort alphabetically by the primary contact
   - **Proposal Reference** – sort by the proposal reference
   - **Date Deleted** – sort chronologically by the date your proposals were deleted.

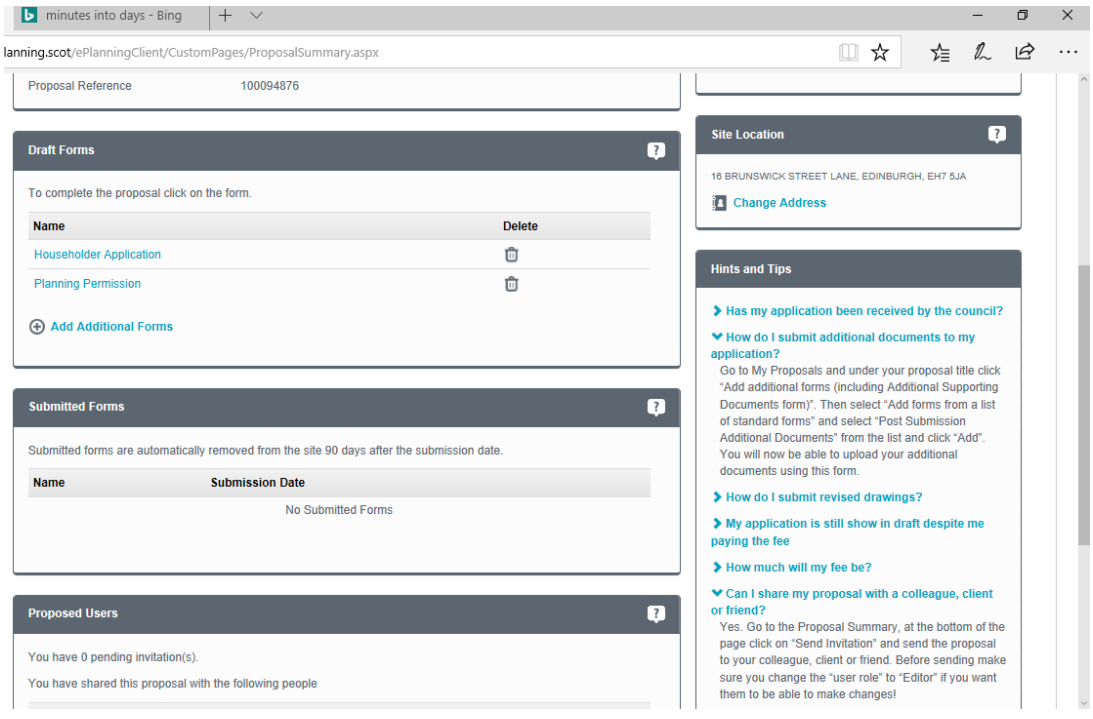
5. Once a proposal has been deleted, you can return it to the Active list again by opening the proposal and

clicking on **Restore Proposal**.

Hints & Tips

On the **Proposal Summary** page there is a hints and tips box on the right hand side of the screen. There is useful guidance here on common problems encountered when making an initial, or post, ePlanning application. These include:

1. How to submit revised drawings
2. How to submit additional documents (including SER Certificates)
3. Application is still in draft after paying a fee
4. Where to calculate a fee
5. How to share proposals
6. Checking on the status of your application
7. What reference number to use in the forms



1. Click on the hint and tip that is relevant to your issue and help text will drop down underneath the

heading.

If the hint and tips do not provide you with the help you need then you can call or email the support desk. The contact details are in the next section.

Contact Details

The eDevelopment Support Desk – can assist you with IT support for the eDevelopment Portal. If you have a query or need assistance using the eDevelopment.scot service, please email us at:

Email: eDevelopment@gov.scot

Planning Aid Scotland – offers a free, impartial and confidential Advice Service to help individuals, community groups and business start-ups navigate the planning system – you can ask questions about your own home or a planning issue in your local area.

Planning Aid Scotland is a charity and social enterprise. This service is funded by the Scottish Government and delivered by staff and volunteers (chartered and recently retired planners).

Get advice: www.pas.org.uk/advice

Local and Planning Authorities – A list of contacts for each Scottish Authority is available here.