Using the Online Portal
Accessing the Portal (1/2)

1) Go to portal.stalbans.anglican.org (this works best on the Internet browser Google Chrome but should also work in other browsers. To download Chrome, simply search for it in Google on your current browser and follow the steps to install).
Accessing the Portal (2/2)

2) Use the flowchart to work out if you already have access to the Portal.
   a) If you are a churchwarden, PCC Treasurer/Secretary, existing DAC applicant, parish clergy or an architect, you should already be able to access the Portal. If you don’t have a password which logs you in, press ‘Request password?’, then enter your email address and then ‘Request Password’ and the system will send you an automated password to the email address we have registered for you.
   b) If you are not one of the above, email Emma (ecritchley@stalbans.anglican.org), who can get you added to the system as a DAC applicant. You will then be able to follow step (a)

3) If you have any issues with logging in, please contact Emma.
The Portal

1) This is the main homepage of the Portal once you have logged in. If you are a churchwarden, PCC Treasurer, clergy etc. you might have more options along the left-hand side.

2) If you were sent an automated password, you may wish to re-set it, which you can do by pressing ‘Your account’.

3) If you cannot see ‘DAC’, then please contact the DAC Team (dac@stalbans.anglican.org).

4) To make a DAC application, press ‘DAC’. This will bring down a drop-down list which says ‘Existing cases’ and ‘New Application’.
   a) To make a new application, press ‘New Application’
   b) To edit an existing application, press ‘Existing cases’ (see page 12)
Adding a new application (1/7)

1. If your application is urgent, please email Emma Critchley (ecritchley@stalbans.anglican.org) who can contact the Registry – you do not need necessarily to continue on the Portal.
2. Any other applications, press yes to the second option. This includes requests for advice and List B requests. We will get an email notification of your application first thing the next working day.
Adding a new application (2/7)

The first stage of the application is to select the basic information about your application – but first, do read the text on this page, which contains lots of useful information about the process leading to a faculty or a List B permission from the Archdeacon.

Once you have added the basic information about your application in the Application Overview tab, please save this (at the bottom of the page). After that, you can move between pages by clicking “Next” at the bottom of the page or by clicking on one of the row of tabs in the middle of the page (“Standard Information Form….Supporting Documents”).
Adding a new application (3/7)

If you scroll down a bit, you’ll find these options. When you’re choosing the church or building, it’s important that you click on the ‘church’ rather than any parish office or similar.

It says a ‘brief description of works’ and that is all we want for this, we don’t need to know specifics like costs or small details of the work as these should be explained in far more detail in the Supporting Documents section later on. Here, we just need an overview which is going to let us know the basics. We can change the description if necessary, but generally make sure that any information that is provided here is also provided in other documents.

When you have filled in each part of this section, please press either ‘Next’ or ‘Save’ before moving on. [This is important on every page to ensure it saves, but it is particularly important on this first page because this creates the case in the system.]
Adding a new application (4/7)

The Standard Information Form cannot be changed by you (even the blank sections).

Please confirm that the form is correct at the bottom (in the red box in the image). If the form is not correct, please specify any ‘Amendments’ in the specified box and we can make changes on our database, which will then update the form.
Adding a new application (5/7)

The next tab is ‘Statements of Significance and Needs’. These documents aren’t required for List B permissions but, for faculties for listed churches, they are useful for you in helping you to understand your building and what changes might be appropriate and for us in helping us to understand what is important about your building and how it is used by your church community. It is especially helpful for DAC members to help understand buildings which they have never visited. For small proposals, they don’t need to be long, but they can really help inform the decision-making process.

If you click on this link within the red circle you will be taken to (continued on the next slide)…
Adding a new application (6/7)

...the Church of England guidance on Statements of Significance and Needs, including pro-forma versions.
Adding a new application (7/7)

We’ll come back to the consultation tab later – this isn’t required when first adding cases to the Portal.

The final tab required for new applications is ‘Supporting documents’. Any relevant information, such as quotations and written specifications, can be submitted, but DAC members particularly like marked up plans and photos to help them to understand the proposals. For each document, enter the description (e.g. specification; photo of location) and then select the file from your own file storage system (as in the red box).

Once you have uploaded all the documents, press ‘Save’, and your application is complete. The DAC office get daily emails at 9am of new cases uploaded to the system, so we will begin to process the application from that point onwards.
If you want to make any changes at any point, you can edit the application by clicking on ‘Existing Cases’ on the DAC section of the Portal, and clicking the edit button on the right hand side.

If you cannot see any cases listed, enter the parish name/part of the name/case reference (if you have it) in the Search box in the Search box and click enter or click on the magnifying glass icon. All the cases for your parish (or the required application) should then appear.
What happens next – Validation and assessing the right route (List B or Faculty? DAC standing committee or full meeting?) (1/2)

Once we have received your application, we will review the application and, if there seems to be a full application – you can do it in stages if that works for you – then we will ‘validate’ the case. In doing this, you will receive an email similar to the one above. After this, we will either prepare to put the case on the agenda for a full committee meeting, which is generally for larger cases, or we will send it to the DAC Standing Committee who can review the case electronically.

Application for Advice via the DAC On-Line Portal

Dear Ms Checker,

**Place:** Marston Morteme, St Mary the Virgin

**Case Reference:** 191770-09208

**Brief Description of Works**
Test application

Thank you for your application for Diocesan Advisory Committee advice, which is being considered. The DAC Secretariat will be in touch with you in due course. In the meantime, you can edit or view your application via the on-line portal.

Please check the Portal to see if external consultations are required before the DAC issues its formal advice on faculty applications.

Yours sincerely,

DAC Secretary
What happens to my application next/what do I need to do?

<table>
<thead>
<tr>
<th>List B</th>
<th>Faculty</th>
</tr>
</thead>
</table>
| • Sent to the DAC Standing Committee for their comments  
  • If recommended by the Standing Committee, we will ask the Archdeacon to issue permission  
  • If not recommended, we will email you with information | • Most sent to DAC Standing Committee for comments, but some to full Committee meeting  
  • If recommended by above, we will issue the DAC’s Notification of Advice (form 2A) and other faculty application documents  
  • If not yet recommended, we will email you with information  
  • Once recommended, you will be able to access the Faculty Petition Form (form 3A) on the Portal which you can begin to complete once the proposals are recommended |

What happens next – Validation and assessing the right route (2/2)

The majority of cases will be sent to the Standing Committee electronically for their comments. If List B works are recommended, we will ask the Archdeacon to issue permission. If a faculty is recommended, we will issue the DAC’s Notification of Advice (form 2A) along with other faculty application documents, which have to be sent to the Registry before they go on to be considered by the Chancellor, who can grant faculties. If proposals aren’t recommended, we will contact you. Sometimes we will ask for more details, other times the Committee suggests alternatives to be considered.
Consultations on some proposals (1/6)

Some cases require consultation with external bodies such as Historic England and National Amenity Societies (which include SPAB, Victorian Society, Georgian Society etc.) or your Local Planning Authority. These include major schemes for re-ordering, provision of facilities or extensions, as well as proposals involving an item or feature of special artistic or historic merit. As part of the new faculty application process from 1 April 2020, any consultations with external bodies must be carried out before the DAC Secretary issues a Notification of Advice. We have also updated this system to make it easier, and it can be done online.

To do this, go back to your applications and click on ‘Edit’
Consultations on some proposals (2/6)

Then, on the application pages, click on the ‘Consultation’ tab. It will tell you here which societies you should consult.
Consultations on some proposals (3/6)

Then click on ‘Open Consultation Creator’...
Consultations on some proposals (4/6)

...Consultation Creator box. You can send it to any recipient if you insert the name in the format explained above. Standard consultee details such as those for Historic England, National Amenity Societies and the Church Buildings Council will be entered automatically. You will need to add the contact e-mail address for other consultees such as your local planning authority. The standard format message provides the consultee with a direct link to the case and invites them to respond within the statutory time of 42 days.

Please note: we advise you to add yourself as an ‘Additional Recipient’. This means the system will send you a copy of the email to the external consultees with the specific link which gives them access to the case on the Portal so they can add comments without having to sign in. You can also ensure that the system has successfully sent out the consultation links.
Consultations on some proposals (5/6)

You can select the relevant documents for the consultee to view. This should include full details to enable the consultee to assess the proposal. The consultee will automatically be sent Form 1A (Standard Information Form) for the case.
Dear Sir/Madam,

I am writing to consult you about the following application under Rule 4.5 [Rule 4.6 for CRC consultation] of the Faculty Jurisdiction Rules 2015 as amended.

Ref No: 191775-06208

Please use this link [https://portal.altraths.org.uk] to view the full details of the application and to submit your comments. Please respond to this consultation within 42 days.

If you need any additional information or would prefer a hard copy of the application please contact Joanna Checkor, Joanna.Checker@altraths.org.uk.

You are being consulted in accordance with under rule 4.5 or 4.6 of the Faculty Jurisdiction (Amendment) Rules 2019. A response you make to this consultation will be taken into account if it is received within 42 days of the date of this electronic communication.

Yours sincerely,

Joanna Checkor

Consultations on some proposals (6/6)

The person or body you are consulting will receive an e-mail as above, with a link to the case, where they can view the supporting documents and make comments which are saved as a document in the Supporting Documents tab.
Next step – completing the faculty petition form (form 3A) (1/15)

Once a faculty application is recommended by the DAC office, you will be able to complete the faculty petition form online. You will be able to access the petition form by going back to the DAC section of the Portal and accessing your cases – underneath any recommended proposals will be the option to click on ‘Forms’.
Next step – completing the faculty petition form (form 3A) (2/15)

Clicking on ‘Forms’ will bring down this choice of forms

You will see Form 1A (Standard Information Form) and Form 2 (DAC Notification of Advice) are available for you to download.

Two further forms are available for you to complete on-line. I’ll take you through the Petition for Faculty form (Form 3A) first, but if you’d like to get on with the Public Notice first, please see below for details about completing Form 4A. If you click on ‘Petition for Faculty (Form 3)’, this will take you to an online version of the form...
Completing the faculty petition form (form 3A) (3/15)

All of the questions are the same as the paper versions many of you would have seen before. We need the details of three petitioners – these are usually the parish priest and churchwardens. If there is any reason why the petitioners are not these three people (e.g. in a vacancy), please explain in a note uploaded under Section M – Further Information. If a case requires an additional petitioner, you can add another person at the bottom of the Petitioners page.
Next step – completing the faculty petition form (form 3A) (4/15)

As you can just about see, they all have the option to be the contact address, but please only click one!
Complete each one of these tabs in as much detail as possible

Next step – completing the faculty petition form (form 3A) (5/15)

This won’t take you through every page of the petition form because it will take too long, but please ask if you have any problems. Please just make sure you use as much detail as possible. The pages save automatically when you move from one tab to the next, but there is a save button on each page if you want to be sure.
Next step – completing the faculty petition form (form 3A) (6/15)

However, you may need to be careful about how much detail you put in section (C) Financial Information. Here, if your answers are too long in the single line section, the Form will not save...
Next step – completing the faculty petition form (form 3A) (7/15)

To make sure your information has saved properly, when you press ‘Next’ or ‘Save’, please make sure you see the line ‘The Faculty Petition has been saved’. If your answers (or one of them) was too long, the form will get stuck on ‘Saving’ and no further details will save.
Next step – completing the faculty petition form (form 3A) (8/15)

Where you wish to upload documents to support your application, upload it by dropping or pasting the file into the box above, or click ‘browse’ to open your files. Continued...
Next step – completing the faculty petition form (form 3A) (9/15)

...you will then see the document in this form. Please note: it is **not** yet uploaded. To complete the process, press the ‘Upload 1 file’ button...
Next step – completing the faculty petition form (form 3A) (10/15)

...when your file has successfully uploaded, you will be able to see it as shown here in the red circle.
Next step – completing the faculty petition form (form 3A) (11/15)

Section K - The PCC Resolution information needs to be completed in every case. Please ensure that you answer every question in this section.

Please upload a copy of the resolution here by following the steps in the previous slide.
Next step – completing the faculty petition form (form 3A) (12/15)

On section L, there is an opportunity to download an electronic copy of the Notification of Advice. You can refer back to the form to check if the DAC have advised any provisos or comments for the faculty, or have taken into account the responses from any external bodies you have consulted.
Next step – completing the faculty petition form (form 3A) (13/15)

...it will download as a pdf which should look very similar to your paper one, except there will be no signature at the bottom. The DAC Secretary now checks the form and confirms electronically that it is ready to be sent out.
Next step – completing the faculty petition form (form 3A) (14/15)

**Signature:**
Question 27 provides an electronic “signature”. You can sign on behalf of the Petitioners, but you should have their authority to do so (if you are not one of the Petitioners) and you must inform the other Petitioners that you have made the application.

Once you have completed the form, press save at the bottom. If the Form saves correctly, you will see ‘The Faculty Petition has been saved’.

[This bit is slightly fiddly]...Then go back to the Existing Cases list and go to Forms again, which will bring up this screen...
Next step – completing the faculty petition form (form 3A) (15/15)

...go back to your applications and click ‘Mark as complete’. This will send a notification to the DAC office and allow you to access a PDF copy of the Form within a few minutes. We will then be able to let the Registry know it has been completed.

You can also mark the form as complete by going back into the Form. There will be a button underneath the progress bar in the top right.
Public Notice (1/6)

Go to the DAC Dashboard to see details of the case and click on > Forms.

This will bring up the Forms as it did earlier. This time, click on Form Public Notice (Form 4). If you are doing this stage before completing the Petition Form, you will need first to go to the Petition Form (form 3A) and complete the first section on Petitioners.
Public Notice (3/6)

Please fill in the details which will appear on the public notice, especially:
1. The location where the public will be able to view the supporting documents for the proposals.
2. Your parish website, where you’ll also need to include a link for people to view the supporting documents electronically.

*Note:* If you go back to the Existing Cases overview and click “Edit”, in the Supporting Documents tab you will find an additional document called the Schedule of Documents. This is the merged complete set of documents which is available for the Chancellor to view. If you wish, you can download it to use as the supporting document set that you make available via your parish website.
3. The date on which you will first display the public notice.
Based on the date you enter, the notice period and the final date for objections will automatically be generated. The box at the bottom of the section indicates that the Certificate of Completion will become available for you to complete on-line once the public notice period has ended.

Click ‘Save’ to fill in the form.
Public Notice (4/6)

Now you’re ready to display the public notice. At point 2.2, click the Download button to download the completed Public Notice. Please then print copies for display inside and outside the parish church and also at the church to which the application refers, if that is another church building in the parish. Please arrange for notice of the faculty application to be published on your parish website for the same period – or ask the DAC Secretary if you don’t have a website – and make sure the Supporting Documents are available for people to view both physically and electronically.
The completed Public Notice is now available as a downloaded document. It should have picked up the names of the Petitioners from the first section of the Petition Form (form 3A) and the other details from those you entered for the Public Notice.
Public Notice (6/6)

At the end of the public notice period, please go back to the DAC Dashboard and click on Public Notice (form 4) again. The Certificate of Completion will now be available at the bottom of the page. Please tick the box to confirm that you have displayed the notice as required for the full notice period.

The completed public notice and certificate of completion will then become available to the Diocesan Registry and the Chancellor.
If you have any trouble with anything on the Portal, please contact:

Emma Critchley  
01727 818138  
ecritchley@stalbans.anglican.org  
or Joanna Chandler  
jchandler@stalbans.anglican.org

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