

Assess an Application

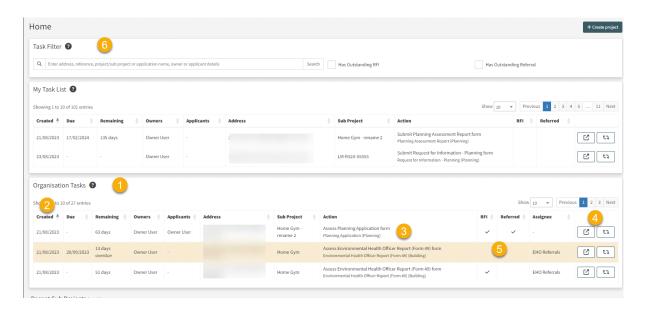
Version 1



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1. Find the Task



Once an application is progressed to 'Assessment' status, it will be available on the PlanBuild Dashboard for users with the 'Assessing Officer' role in the portal to claim/assign.

The following tips might help you find a task:

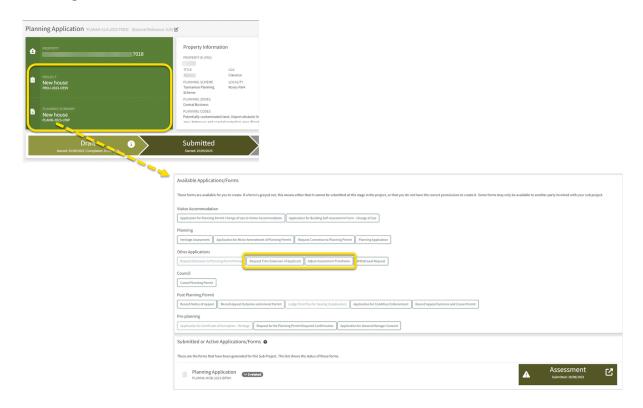
- 1. Any unassigned tasks you have access to will appear under 'Organisation Tasks'. Any tasks you currently have claimed will appear under 'My Task List'. If there is only one Admin Officer / Assessment Officer in the Department, the task will go directly to their 'My Task List'.
- 2. You can select any of the column headings to rearrange the task list by different criteria, such as Created Date, Due Date, Address, etc.
- 3. See the 'Action' column to check the type of application, and the action required. At this stage, the action item should be listed as 'Assess Application form'.
- 4. Select the 'pop out' button to open the task in a new tab (so that you can view the referral and other details you need from dashboard). You can click on the 'cycle' button to view the referral history (including payment request) of the application.

Assess an Application

- 5. A tick under the RFI column indicates the application has a current RFI, which does not stop the application from being progressed to Assessment stage.
- 6. You can search for a task directly in the search bar by Address, Reference Number, Project, Sub Project or Application Name, Owner or Applicant details. This will filter both the 'My Task List' and 'Organisation Tasks'.



2. Adjust Assessment Timeframe



During assessment, an Assessing Officer can adjust the timeframe via 'Request Time Extension of Applicant' or 'Adjust Assessment Timeframe'.

To find the 2 forms, navigate to the Sub Project Summary page via the panel on the top left of the Assessment page.

3. Claim Task

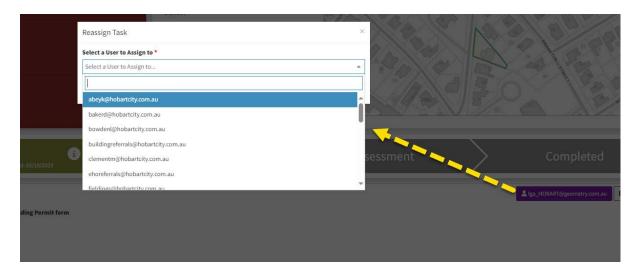


After opening the application, you can claim the unassigned task.

Please note that you can view the application without claiming the task, as can anyone in the organisation.



4. Reassign Task



You can unclaim the task using the 'Unclaim' button or reassign it to others using the purple button with your email address on it if needed.

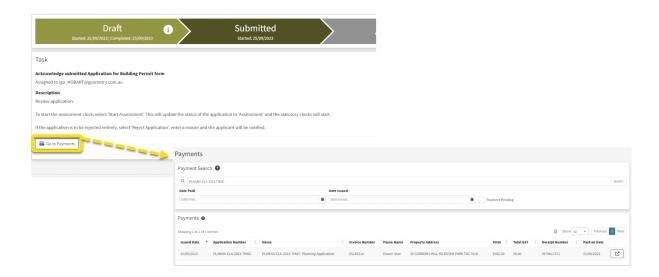
The task will then appear on the selected user's 'My Task List' and they will receive an email notification that a new task has been assigned to them.

If you unclaim a task without reassigning to an individual user, it will appear back in the 'Organisation Tasks' for anyone with the appropriate role in PlanBuild Tasmania to claim.

You can add notes to the internal 'notes' section before you reassign a task to provide more detail/information to the assessor. These will not be visible outside of your organisation.



5. View Payment

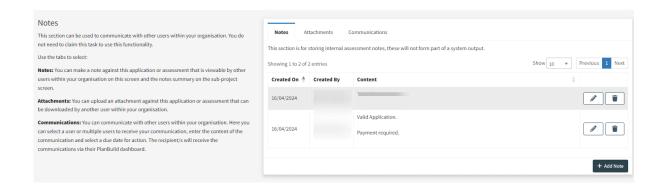


If a payment has been made for an application (either Upfront or via a request for payment) the 'Go to Payments' button will appear. This button will lead you to the Payments page and filter the search to payments related to this application only.

Payment details can also be found by selecting 'Payments' on the left-hand-side navigation bar, this will show all payment records for your organisation.



6. Notes

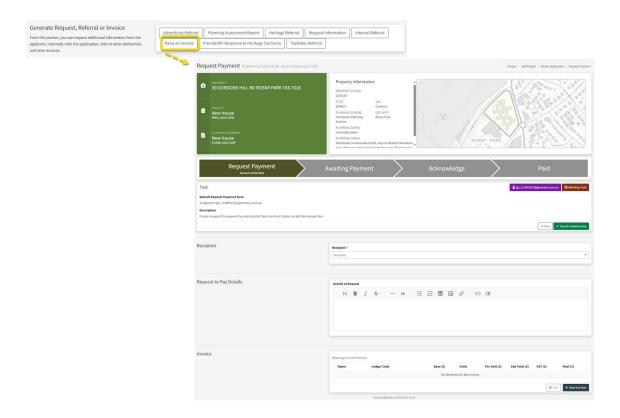


The 'Notes' section under the task description box is for internal use and the notes will not be visible to the applicants or anyone outside of the organisation. There are 3 tabs:

- 1. Notes It can be used for any kind of internal communication, such as noting any communications with the applicant outside of PlanBuild Tasmania (e.g. emails, phone calls, etc.), or to provide any additional information to an assessor or a staff member who is taking over the task.
- 2. Attachment to attached any documents for internal use only.
- 3. communications make a note to one or more specific internal user(s). Users being named in the message will receive the communication via their dashboard.



7. Raise an Invoice

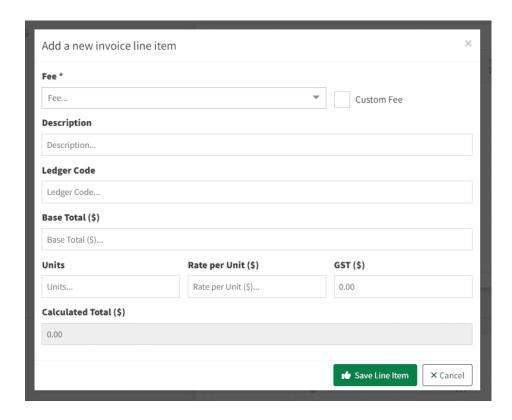


Click on 'Raise an Invoice' under the 'Generate Request, Referral or Invoice' section to open up the 'Request Payment' form, where you can put in the details of the request.

Choose a recipient from the drop down, you can review the application form in a separate tab to find the names of the applicant, owner etc. to ensure you select the appropriate person.

You can provide more information to the person receiving the request such as why additional fees are being requested (e.g. for advertising of a Planning Permit application if not charged initially).





Under 'Invoice', select '+New line item' to select individual payment item(s). You may add multiple line items to a single request.

Click 'Save & Create Invoice' to generate the request.

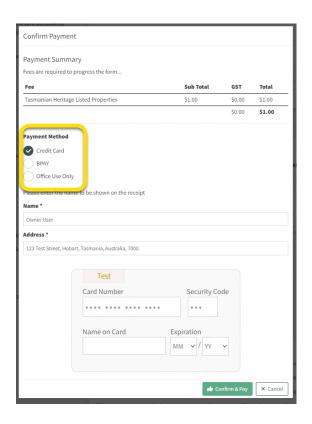
The request will be sent to the selected user via email and PlanBuild Tasmania notifications. Once a payment has been made, you will be notified and see in your 'My Task List' there is a payment ready for review.



8. Payment method - Office Use Only

For upfront payments, applicants can pay via:

- 1. Credit card
- 2. BPay
- 3. The 'Office Use Only' button



The 'Office Use Only' button would allow applicant to submit the application without making a payment. An applicant should only use it after being instructed by a staff to do so.

Note: With BPay, the application will be only be appear at Council users' dashboard on the day after the payment has been made. Before that, the application would sit with the application under 'Draft' status and not visible for Council.



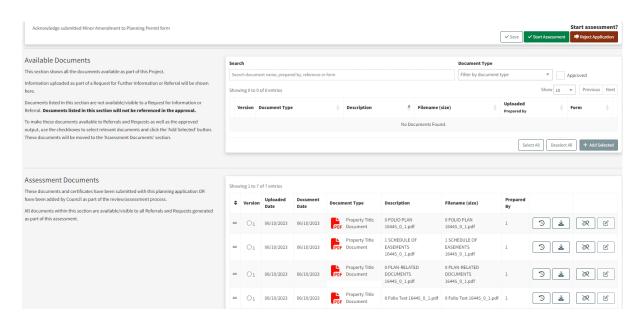
9. Review application details and perform assessments



You can review the application details and put in details of assessment, conditions, recommendations, etc. The application form sections will look different depending on the type of application.

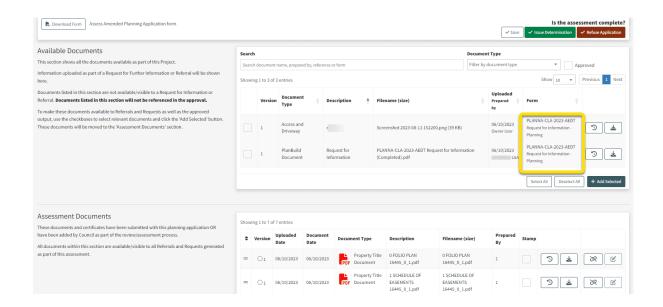


10. Available Documents and Assessment Documents



Documents submitted with the application will be available under 'Assessment Documents' - These are the documents that will form part of the assessment and approval. Assessment Officer can unlink any irrelevant documents if needed, and those documents will stay under 'Available Documents' and you can add them back in the future if needed.



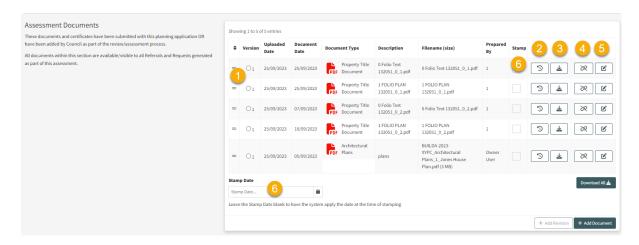


The completed referral requests and the documents obtained throughout the administration and assessment processes will be listed under 'Available Documents', you need to add them to 'Assessment Documents' for them to form part of the approved document pack.

For viewing purpose only - You can also find the list of referrals under the 'Requests and/or Referrals' section, you can also download the documents from there.



11. What can you do with the Assessment Documents?



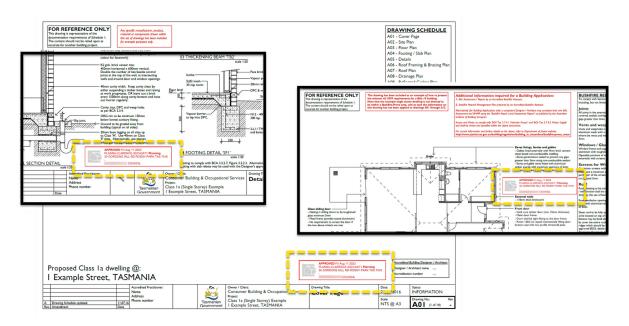
Please refer to the numbers on the image for the following:

- 1. You can select any Assessment Documents and use the '+Add Revision' button to upload a new revision.
- 2. You can check any of the previous version of the same document.
- 3. You can download an individual document using the download button, or download all of them using the 'Download All' button at the bottom right corner of this list.
- 4. If a document is irrelevant to the assessment, you can unlink it. The unlinked document will stay under 'Available Documents', and you can add them back from there anytime.
- 5. You can edit the document details (if required).
- 6. You can choose the documents to be stamped and apply a stamp date to it.

Note: Any documents in the 'Assessment Documents' section, once the determination is issued, will form part the approved documents, which will be listed on the Permit/Certificate and be downloadable by the applicant.



12. Stamping



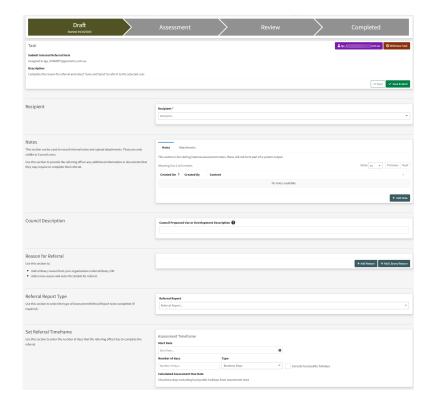
As an Assessing Officer, you can stamp documents if required. Tick under the 'Stamp' column for the documents that you would like to stamp and apply a stamp date, if left blank the document will be stamped as the determination date.

PlanBuild Tasmania will apply the stamp on empty space on every page of the document, beginning in the bottom right-hand corner until a suitable location is found.

If you do not wish to put a stamp on every page, you can download the document, stamp the appropriate pages and upload it back to the application.



13. Internal / External Referrals



The referral process for different kinds of applications and referred parties follow the same process.

Choose the appropriate form under the 'Generate Request, Referral or Invoice' section, enter the details and attach any documents if needed. 'Save and Submit' the form.

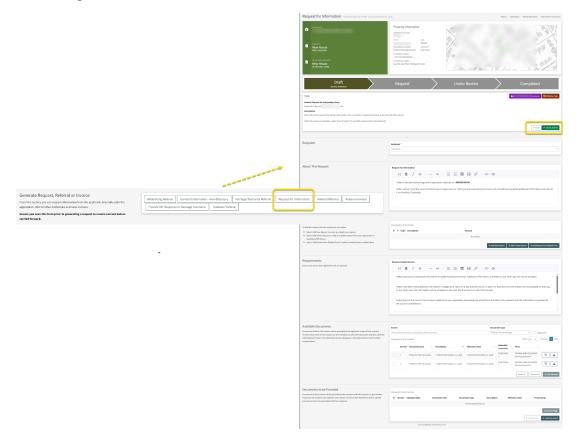
The referred party will then get an email and a notification in their PlanBuild mailbox.

You will receive an email and a notification in your PlanBuild mailbox when a response is available. The task will also appear under 'My Task List'.

If the assessment timeframe has been paused because of a referral (e.g. a Request for Information) it will resume once you accept the response. See 'adjusting the assessment timeframe' if you need to adjust the clock based of when the response was originally received.



14. Request for Information



You may request for more information from the applicant during the assessment. Use the 'Request for Information' button to open up the form, inset the request using either the '+Add New Reason' button for free typing or '+Add Library Reason' for standard requests that have been saved in the library.

You can consolidate different referral parties' requests and send that to the applicant in one go, to add an RFI reason from a referral select '+Add reason from related form' and any relevant requests will appear to be added.

Upload relevant documents (if required) and select 'Save and Submit', the applicant will get a notification from PlanBuild Tasmania.

You will get a notification and see it in your 'My Task List' when a response is available.

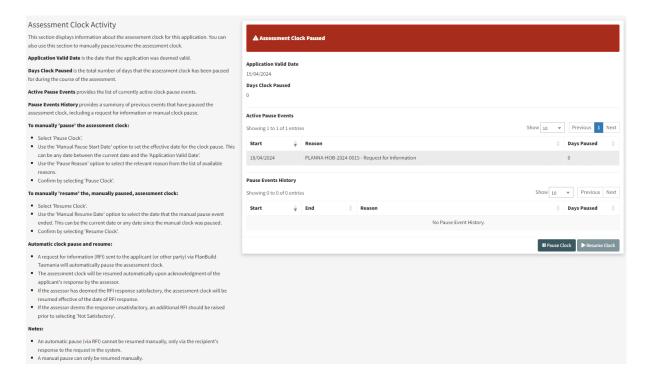
The statutory clock stops when the Request for Information form is sent, resumes when you click the 'Save and Acknowledge' button on the response.

See 'adjusting the assessment timeframe' if you need to adjust the clock based of when the response was originally received.

Note 1. See 'adjusting the assessment timeframe' if you need to adjust the clock based of when the response was originally received.

Note 2. There is an option to use the 'General Information - Non-Statutory' form if you would like to obtain further information from the applicant without stopping the statutory clock.

15. The Assessment Clock



The assessment clock will stop once the Request for Information is sent out and will resume automatically when the Assessing O cer confirms 'Satisfied' with the response. In the cases of unsatisfactory, the Assessing O cer should raise an Additional Request within the response, and then select 'Not Satisfied' to keep the clock pausing while pending for further responses.



The Assessing Officer can also stop the clock manually using the 'Pause Clock' button and 'Resume Clock' manually when they are satisfied with the responses.

Current clock status and clock pausing events are recorded under the 'Assessment Clock Activity' section.

15. Finalise the assessment

Once the assessment is complete and you are ready to issue the determination (i.e. Certificate/Permit/Notice or Refusal) the signature field must be completed by an authorised person.

See the Issue a Permit/Certificate User Guide for this process.

If you are not responsible for issuing determinations, and you need to refer the task to someone else to review, you can add a note to the internal 'notes' section and reassign the task by selecting the purple button with your email address to go to an individual or unclaim the task for it to return to the 'Organisation Task' list.

