PlanBuild TASMANIA

TasWater User Guide: Respond to a Referral

Version 1

Tasmanian Government

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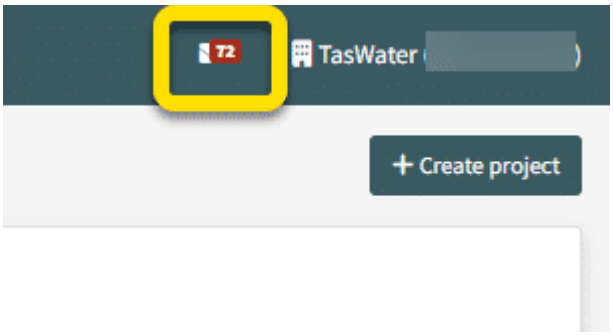
Introduction

When TasWater receives a referral from the Planning Authority, it would first be visible to users who have the Assessing Officer role in the portal under Organisation Tasks. After the referral is deemed valid, and noted by the support officer (contains sufficient details and documents), the manager of the department can assign to one of the Assessing Officer to review, and provide a response to the Planning Authority.

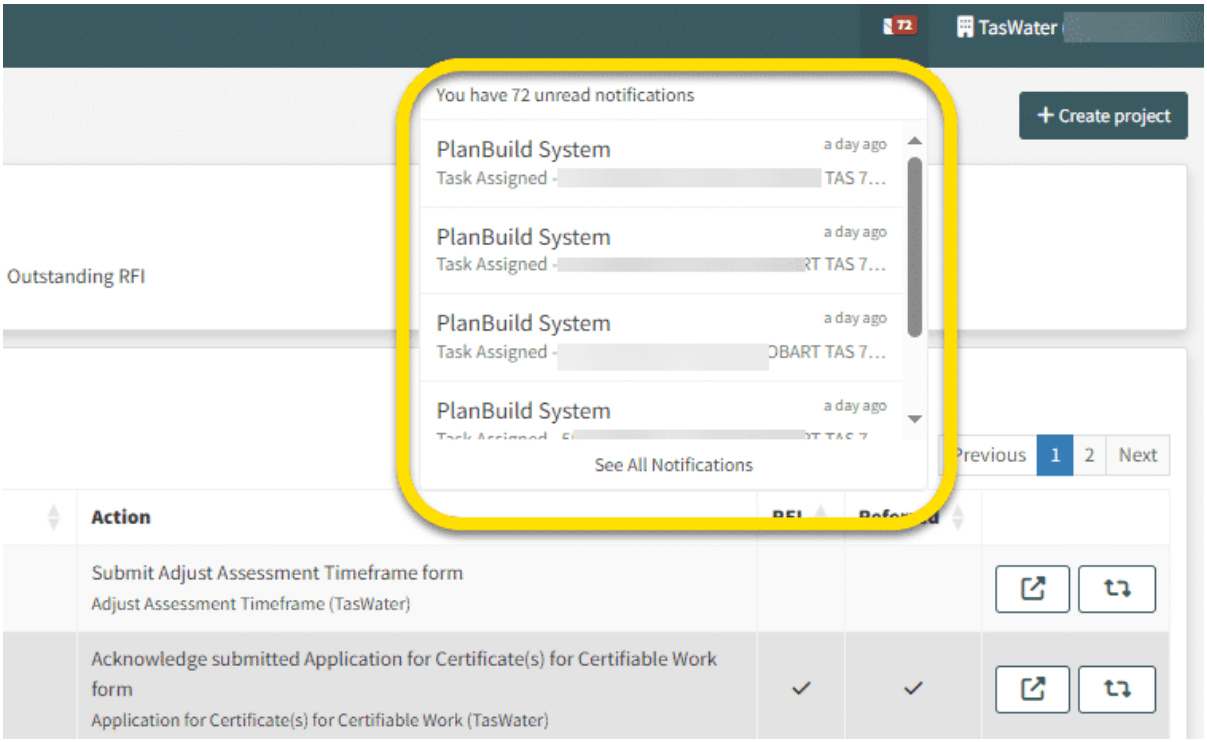
How do I know if a referral has been made to me / my team?

PlanBuild Tasmania Notifications



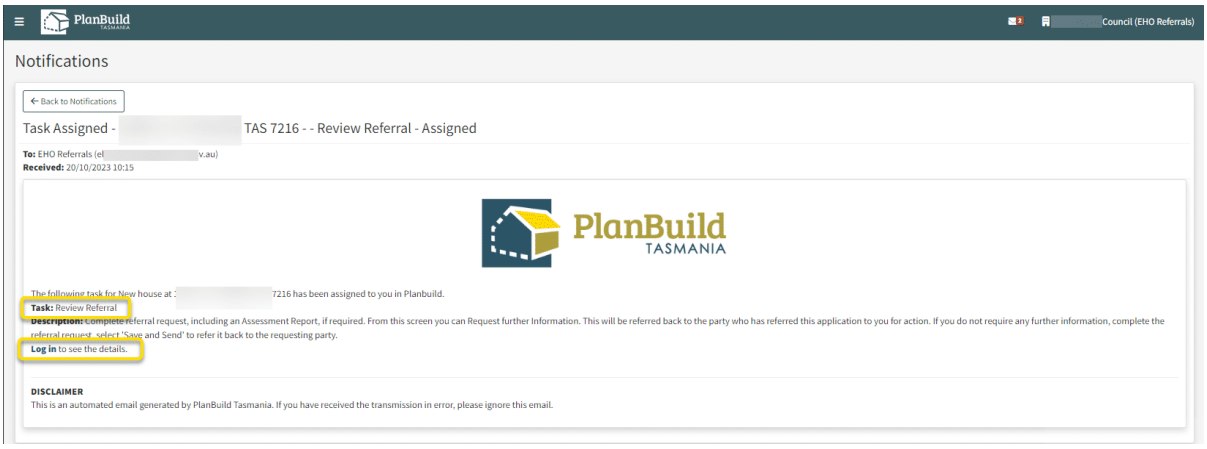
When the referral first comes in, the users with Assessing Officer role (including the Development Officers) will see a notification in their PlanBuild Tasmania mailbox.

A notification email will also be sent to their email address they registered with PlanBuild Tasmania.



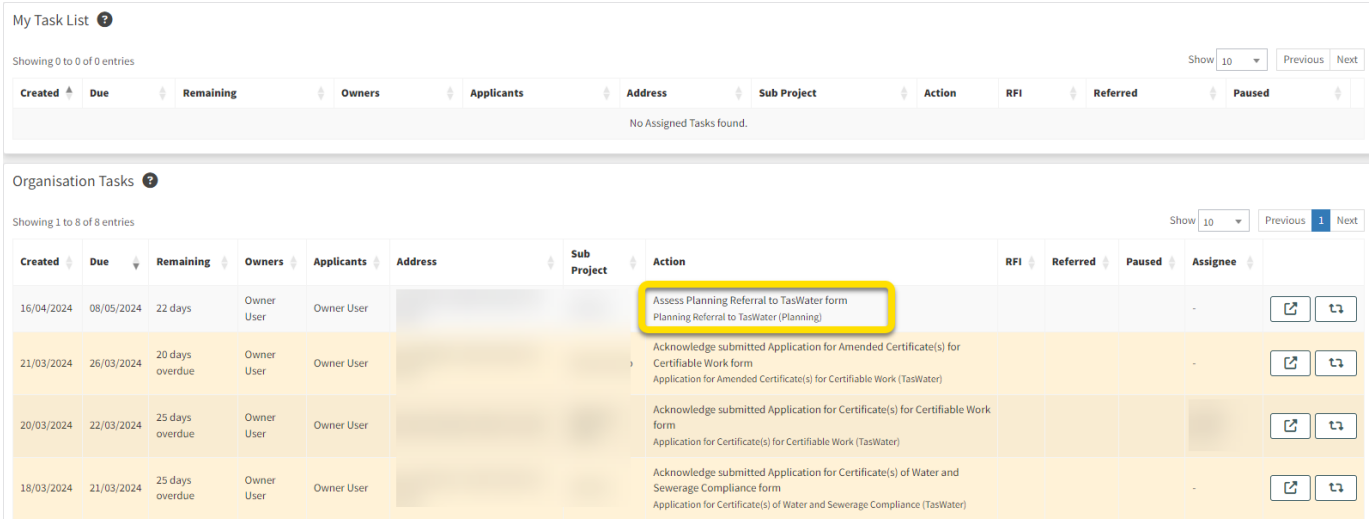
By clicking on the white envelope icon, you can see and open the most recent notifications.

You can click on the notifications to view full details.



Clicking 'Log in' in the notification will take you directly to the task you need to complete.

Task Lists



Alternatively, Officers can find the new referral task in one of their Task Lists on the dashboard.

The task will appear under 'Organisation Tasks' for any of you to open, view and claim.

There are two action icons at the end of the row. You can open the task in a new browser using the pop-out icon so that you can keep this page (dashboard) open. Clicking the other icon will show you a list of referral history of this application (if there are any).

As a Development Support Officer (Users assigned with the 'Admin Officer' role in the portal)

- Review and validate the application

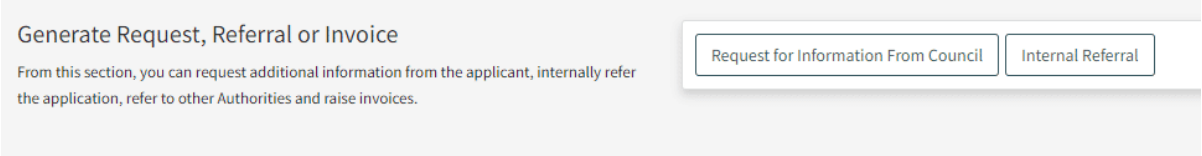
Claim Task

Image on the left - You have to select 'Claim Task' first if the task was not directly assigned to you.

Image on the right - You do not have to 'Claim Task' if the referral is assigned to you directly. However, if for any reason you need to reassign it to someone else, you can click on the purple button (which will have your email address on it) and select the assignee from the dropdown.

You also have the option to 'Unclaim Task', which will release the task back to the Organisation Task List on the dashboard for another user to claim.

Review and Referrals



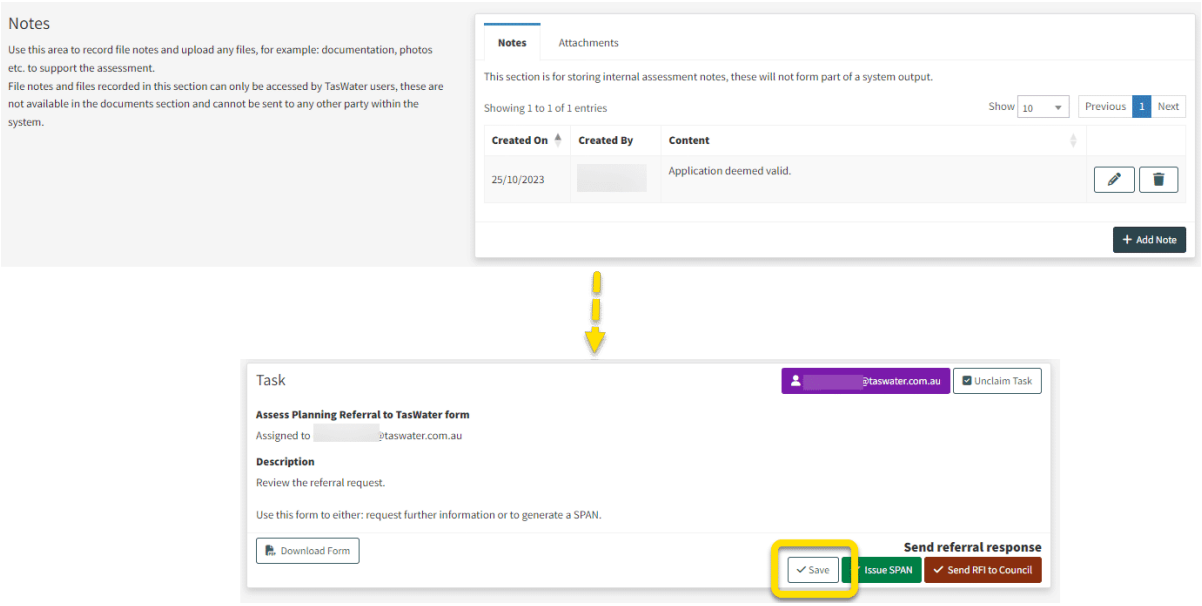
Officers can view the details of the referral and the documents attached to it.

If further information is required from the applicant, the Officer can start a 'Request for Additional Information' form under 'Generate Request, Referral or Invoice' to do that.

They can start an 'Internal Referral' at the same time if needed.

In PlanBuild Tasmania, these referral processes do not stop the Admin Officer from progressing the referral responses to the next stage, however, it depends on the organisation's process on if they need to wait until all required documents are received.

Release the Task to the Assessment Team



When ready, note under the Notes section that the application is valid (and any other information that needs to be recorded). You can also attach any documents, or create a task to a particular user under the 'Communications' tab if needed.

The Notes section is only visible to internal users.

At the bottom of the Task summary box, click 'Save'. And then, depending on the agreed business procedure, either:

1. Click on the purple button, reassign the task to the Development Assessment Manager or Development Compliance Manager.

or

2. Unclaim the Task, so that the Development Assessment Manager or Development Compliance Manager can claim them from the Organisation Task List.

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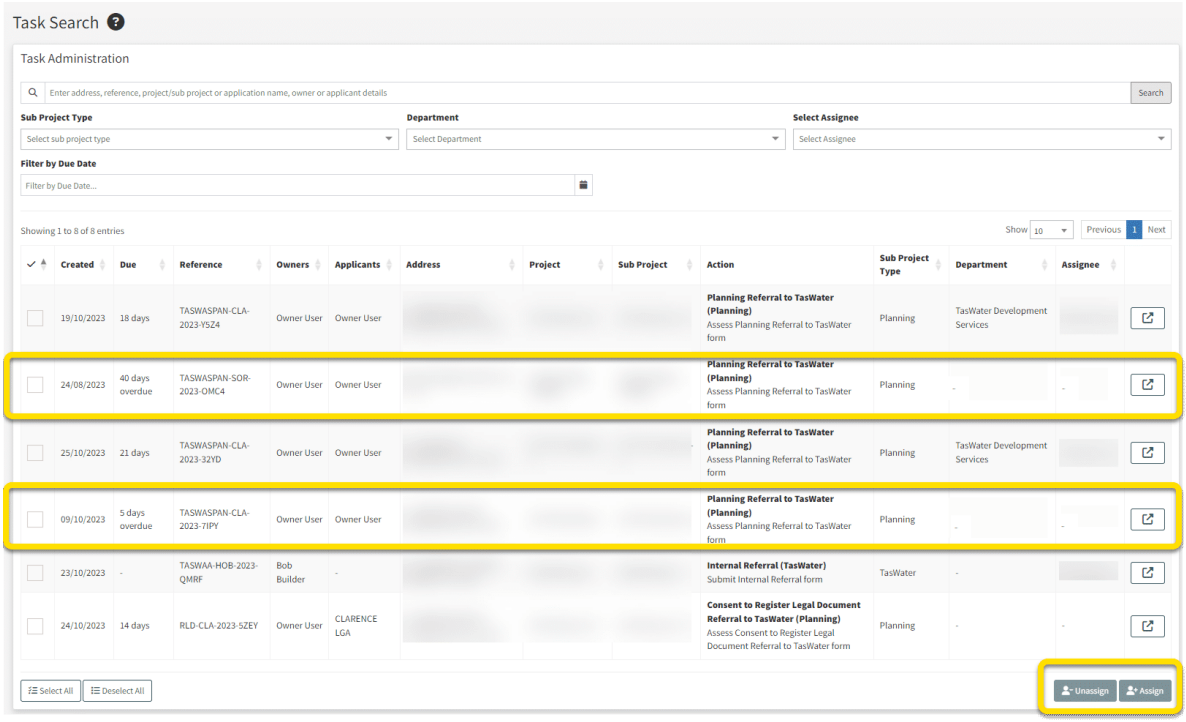
As a Development Assessment / Compliance Manager (Users assigned with the Work Manager role in the Portal)

Reassign task

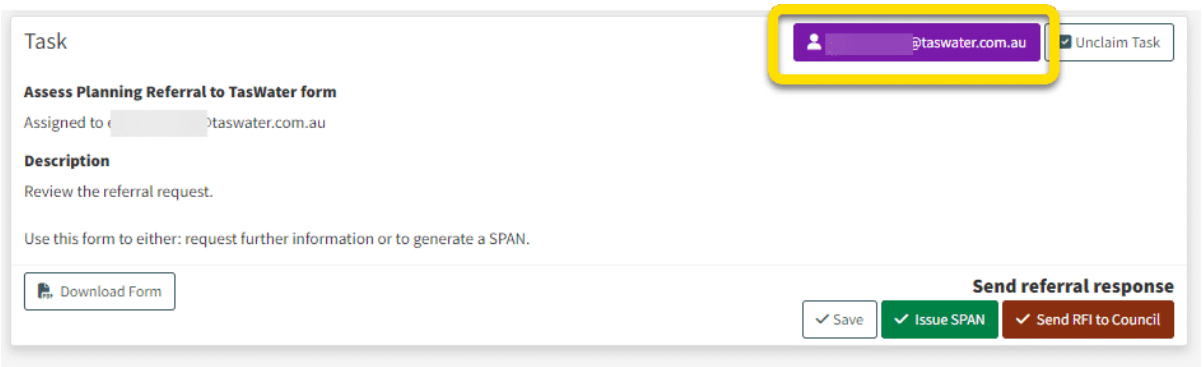


The manager will be given the Work Admin role in the portal. When the referral tasks are ready to be responded to, they can assign the task among their team. There are two ways to do that.

They can use the search function to perform a Task Search, select the relevant referral tasks and assign them to a particular Assessing Officer.

(When clicking on '+Assign', a drop down would come up and you can pick the assignee from there.)

Find the Task under Task List



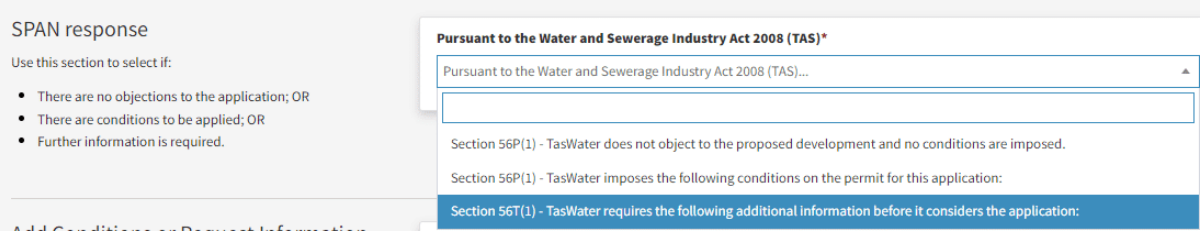
Depending on the business procedure, the manager would be able to find the referral task under either 'My Task List' (if the Task is assigned to the manager directly by the Admin Officer) or Organisation Tasks (if the Officer only release the task using the 'unclaim' button).

Enter the task page. In the Task Summary Box, claim the task if it hasn't been assigned to you, and then click on the purple button to assign it to an Assessing Officer.

As an Assessing Officer

- Review the application and respond to the referral.

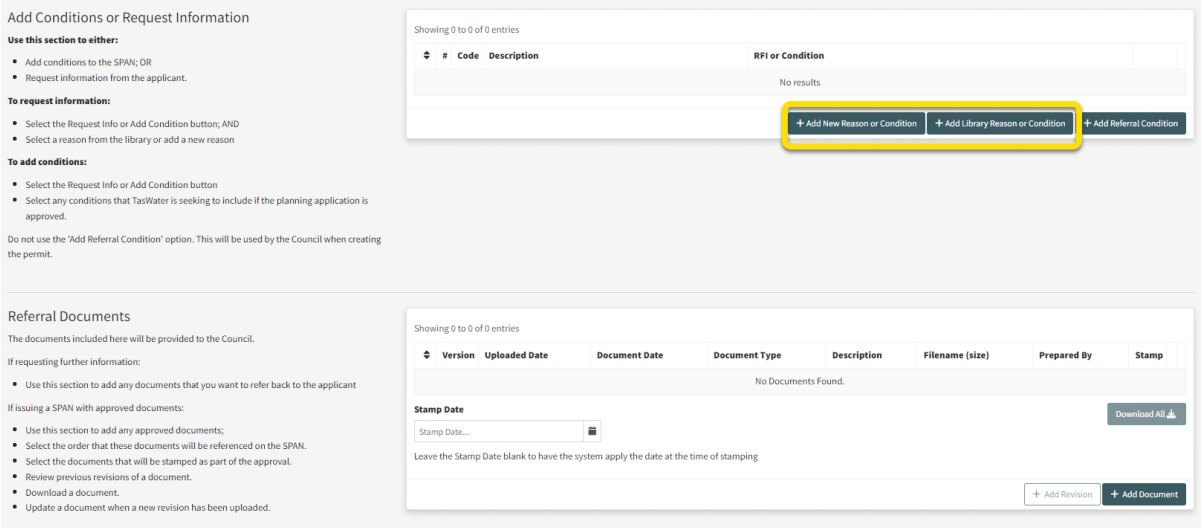
Review and respond



You can review the planning application and the documents provided in the application.

Select the appropriate type of SPAN response from the drop down (no objection /conditions applied / further information required).

Add Conditions and Documents

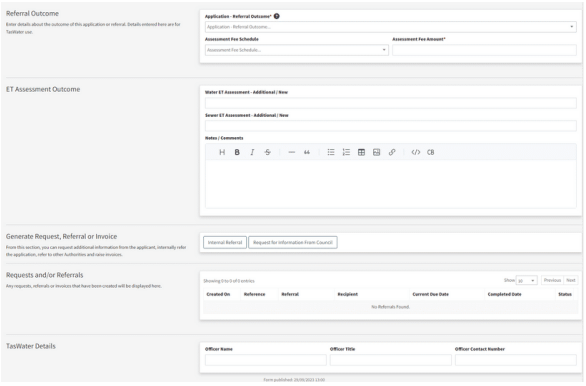


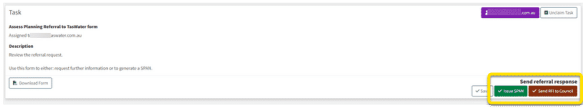
Add conditions or requests for information under 'Add Conditions or Request for Information'. You can add pre-entered conditions and reasons for request using the '+Add Library Reason or Condition' button, or type in new content using the '+Add New Reason or Condition' option.

Do not use the 'Add Referral Condition' option - this will be used by the Council when creating the permit.

The documents included under 'Referral Documents' will be provided to the Council. You can use this section when requesting for further information or issuing the SPAN. However, you should Leave the stamp date blank, the system will apply the date at the time of stamping.

Send off the Response





Choose the appropriate Referral Outcome and Assessment Fee Schedule from the dropdowns, and state the Assessment Fee Amount.

State the ET Assessment Outcome.

Put in your name, title and contact details (for the Planning Authority's reference).

Lastly, choose either 'Issue SPAN' or 'Send RFI to Council' in the Task Summary box to send off the referral response.

The Planning Authority will now receive a notification and be able to review the SPAN.