



PlanBuild
TASMANIA

TasWater User Guide: Respond to a Referral

Version 1

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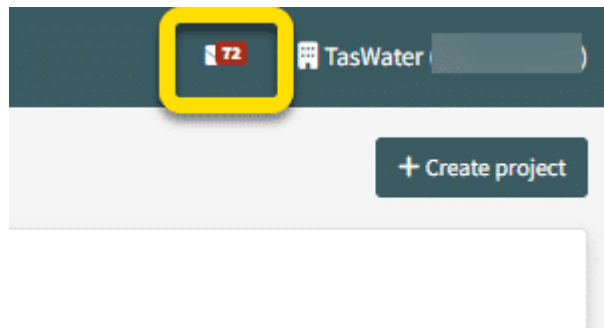
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Introduction

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.

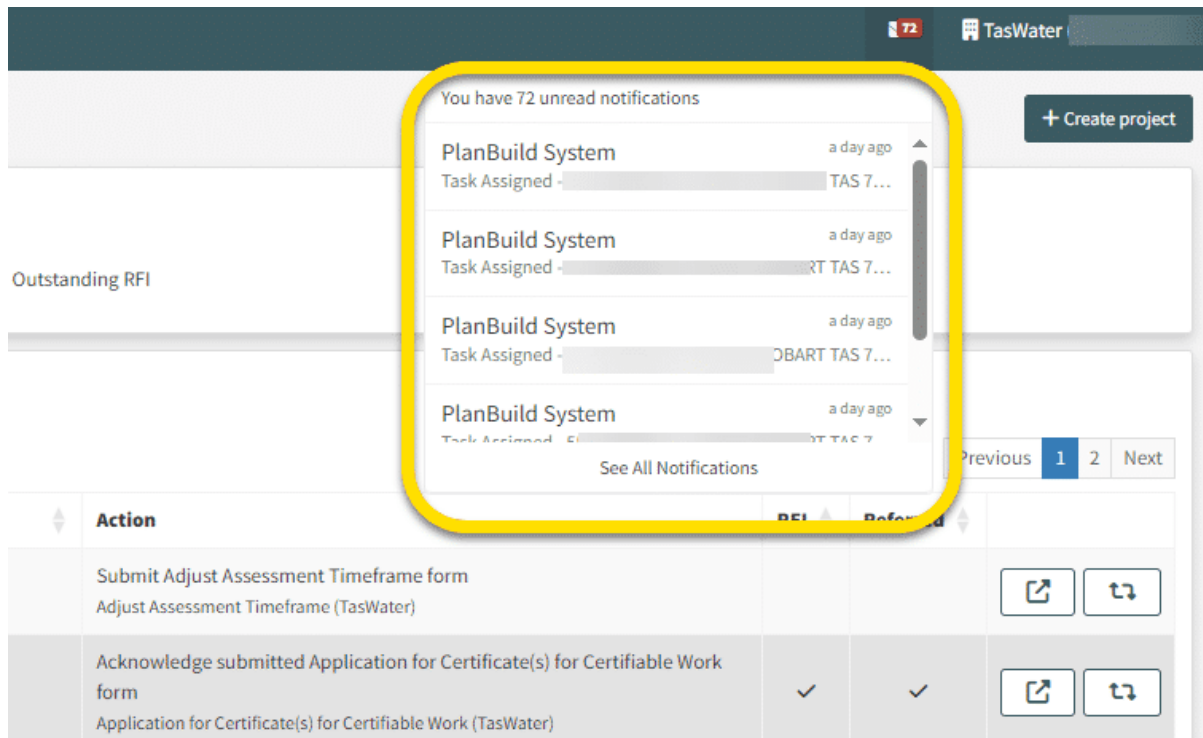
How do I know if a referral has been made to me / my team?

PlanBuild Tasmania Notifications



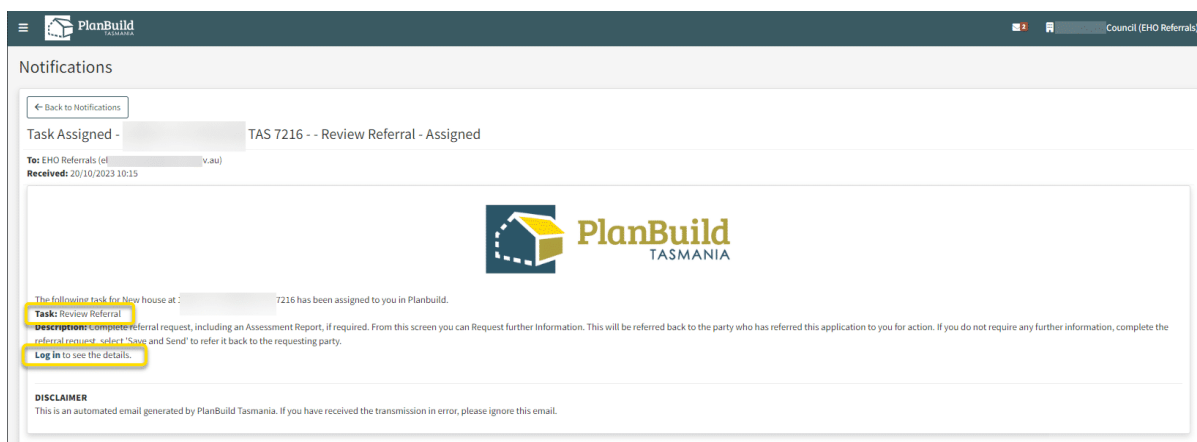
When the referral first comes in, the users with Assessing Officer role (including the Development Officers) will see a notification in their PlanBuild Tasmania mailbox.

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









My Task List ?

Showing 0 to 0 of 0 entries Show 10 Previous Next

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred	Paused	
No Assigned Tasks found.											

Organisation Tasks ?

Showing 1 to 8 of 8 entries Show 10 Previous 1 Next

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred	Paused	Assignee	
16/04/2024	08/05/2024	22 days	Owner User	Owner User			Assess Planning Referral to TasWater form Planning Referral to TasWater (Planning)				-	 
21/03/2024	26/03/2024	20 days overdue	Owner User	Owner User			Acknowledge submitted Application for Amended Certificate(s) for Certifiable Work form Application for Amended Certificate(s) for Certifiable Work (TasWater)				-	 
20/03/2024	22/03/2024	25 days overdue	Owner User	Owner User			Acknowledge submitted Application for Certificate(s) for Certifiable Work form Application for Certificate(s) for Certifiable Work (TasWater)				-	 
18/03/2024	21/03/2024	25 days overdue	Owner User	Owner User			Acknowledge submitted Application for Certificate(s) of Water and Sewerage Compliance form Application for Certificate(s) of Water and Sewerage Compliance (TasWater)				-	 

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

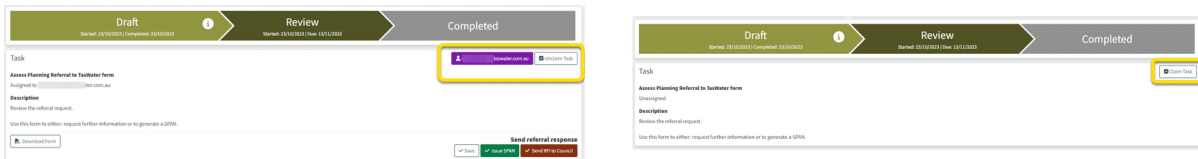


Image on the left - You have to select 'Claim Task' first if the task was not directly assigned to you.

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

Generate Request, Referral or Invoice

From this section, you can request additional information from the applicant, internally refer the application, refer to other Authorities and raise invoices.

Request for Information From Council

Internal Referral

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

The image shows two screenshots from the TasWater system. The top screenshot displays the 'Notes' section, which includes instructions on how to use it for recording file notes and uploading files. Below the instructions is a table with columns for 'Created On', 'Created By', and 'Content'. A single entry is shown with the date '25/10/2023' and the content 'Application deemed valid.'. The bottom screenshot shows the 'Task' summary box for 'Assess Planning Referral to TasWater form'. It includes the assigned user '@taswater.com.au', a description of the task, and a 'Send referral response' section with buttons for 'Save', 'Issue SPAN', and 'Send RFI to Council'. A yellow box highlights the 'Save' button.

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.

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

Reassign task

The screenshot shows the 'Task Search' interface. At the top, there is a search bar and several filter dropdowns: 'Sub Project Type', 'Department', and 'Select Assignee'. Below these is a 'Filter by Due Date' section. The main area displays a table of tasks with columns for 'Created', 'Due', 'Reference', 'Owners', 'Applicants', 'Address', 'Project', 'Sub Project', 'Action', 'Sub Project Type', 'Department', and 'Assignee'. Three rows in the table are highlighted with a yellow border. At the bottom right of the table, there are two buttons: 'Unassign' and 'Assign', both highlighted with a yellow border.

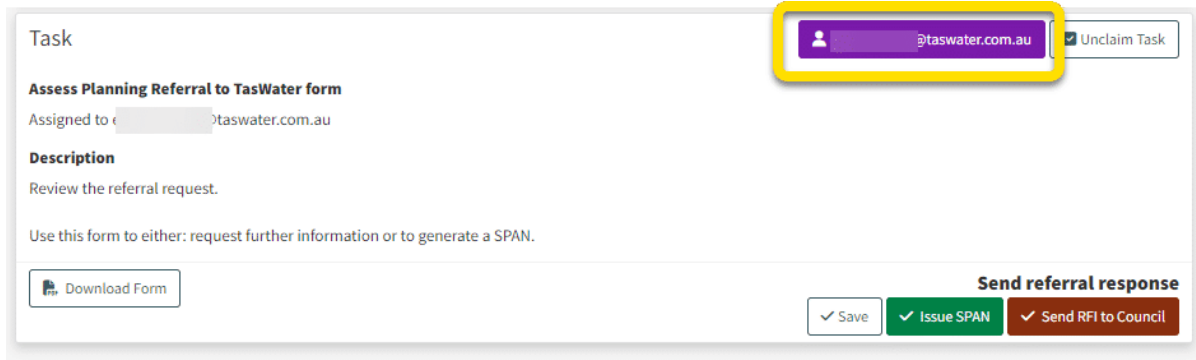
Created	Due	Reference	Owners	Applicants	Address	Project	Sub Project	Action	Sub Project Type	Department	Assignee
19/10/2023	18 days	TASWASPAN-CLA-2023-V5Z4	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	TasWater Development Services	
24/08/2023	40 days overdue	TASWASPAN-SOR-2023-DMC4	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	-	
25/10/2023	21 days	TASWASPAN-CLA-2023-32YD	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	TasWater Development Services	
09/10/2023	5 days overdue	TASWASPAN-CLA-2023-7IPY	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	-	
23/10/2023	-	TASWAA-HOB-2023-QMRF	Bob Builder	-				Internal Referral (TasWater) Submit Internal Referral form	TasWater	-	
24/10/2023	14 days	RLD-CLA-2023-5ZEY	Owner User	CLARENCE LGA				Consent to Register Legal Document Referral to TasWater (Planning) Assess Consent to Register Legal Document Referral to TasWater form	Planning	-	

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



Task

Assess Planning Referral to TasWater form

Assigned to [redacted]@taswater.com.au

Description

Review the referral request.

Use this form to either: request further information or to generate a SPAN.

Download Form

Unclaim Task

Send referral response

Save Issue SPAN Send RFI to Council

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

The screenshot shows a web interface for selecting a SPAN response. On the left, under the heading "SPAN response", there is a list of options: "There are no objections to the application; OR", "There are conditions to be applied; OR", and "Further information is required." On the right, a dropdown menu is open, showing the selected option: "Pursuant to the Water and Sewerage Industry Act 2008 (TAS)*". Below the dropdown, there are three text boxes: "Section 56P(1) - TasWater does not object to the proposed development and no conditions are imposed.", "Section 56P(1) - TasWater imposes the following conditions on the permit for this application:", and "Section 56T(1) - TasWater requires the following additional information before it considers the application:". The third option is highlighted in blue.

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 Request Information

Use this section to either:

- Add conditions to the SPAN, OR
- Request information from the applicant.

To request information:

- Select the Request Info or Add Condition button; AND
- Select a reason from the library or add a new reason

To add conditions:

- Select the Request Info or Add Condition button
- Select any conditions that TasWater is seeking to include if the planning application is approved.

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

Referral Documents

The documents included here will be provided to the Council.

If requesting further information:

- Use this section to add any documents that you want to refer back to the applicant

If issuing a SPAN with approved documents:

- Use this section to add any approved documents;
- Select the order that these documents will be referenced on the SPAN.
- Select the documents that will be stamped as part of the approval.
- Review previous revisions of a document.
- Download a document.
- Update a document when a new revision has been uploaded.

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

Created On	Reference	Referral	Request	Current Due Date	Completed Date	Status
			No Referrals Found			

Send referral response
Issue SPAN Send RFI to Council

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.