



**PlanBuild**  
TASMANIA

## Train the Trainer Manual

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## Train the Training Course

Course Title – Train the Trainer	
Time	1 Hour
Audience	Trainers
Requirements/resources	Not applicable
Pre-requisite courses	<ul style="list-style-type: none"> <li>- Business Education Program</li> </ul>
Learning Activities	<p>Training Curriculum Overview</p> <p>Introduction to Day-In-The-Life (DILo) Scenario based training</p> <p>Running the training sessions</p> <p>Where to find support &amp; resources</p>
Learning Outcomes	<p>At the end of this session, participants will be familiar with the training approach including:</p> <ul style="list-style-type: none"> <li>- How to deliver the required courses to end users within your organisation</li> <li>- How to learn the necessary content and facilitation skills to confidently and accurately train others in the use of the PlanBuild Tasmania (PlanBuild) Application Services functionality</li> <li>- How to use Day-In-The-Life Scenarios for training</li> </ul>

## Specific aims of PlanBuild Tasmania training

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The Training Delivery Support provided by the PlanBuild Tasmania project team is broken into 2 key parts:

- Train the Trainer
- End User Training

### Train the Trainer

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Participants undertaking the Train the Trainer Course will:

- learn the necessary content and facilitation skills to confidently and accurately train others in the use of the PlanBuild Tasmania Application Services functionality.
- will be provided tools, including this document, on how to run end user training sessions.

### End User Training

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Participants in the end user training will:

- learn the necessary skills to confidently use the PlanBuild Tasmania Application Services functionality relevant for their roles
- will be provided tools by the trainers to support the training both during the course and post to ensure staff are suitably prepared to use PlanBuild.

### Using this Manual

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This manual provides an overview of the training and outlines the content and objectives of each course.

It details the materials needed to run each session and provides guidance for using the training materials in the sessions.

Prior to delivering end user training, trainers should complete the Train the Trainer sessions with the PlanBuild Tasmania team.

The Train the Trainer sessions provide contextual information about the PlanBuild solution as well as facilitation notes, background information and points for discussion.

It is important that Trainers are familiar with the all the training material before using it. This means becoming very familiar with this document, and more importantly the PlanBuild solution.

Trainers need to be well prepared in order to make sure that the group feels supported and understood and that Trainers can accurately answer questions posed by the participants.

## Overview of the Train the Trainer Package

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These materials were developed to support Trainers in training end users in the PlanBuild solution.

This package is the full Train the Trainer package and includes all end user training materials that can be provided to participants as part of the training.

These Training Materials have been developed to assist trainers to deliver the required courses to end users within their organisation.

It will cover training for the following End User Training Courses:

- Getting Started
- Planning Application – Administration
- Planning Application – Assessment
- Building Application – Administration
- Building Application – Assessment
- EHO Assessment
- Internal Referrals
- Plumbing Application – Administration
- Plumbing Application – Assessment
- Surveying Services – Assessment
- Finance
- Organisation System Administration
- Environmental Health – Administration and Assessment (TBD)
- Public Health – Administration and Assessment (TBD)



## Training Materials

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The full training package includes:

- This manual, which provides facilitation notes and points to cover for trainers
- Training slides with slide notes for each course
- Training packages for printing and providing to end user participants
- Tips for Trainers
- PlanBuild Help Pages and other resources available online
- Pre training delivery checklist

These materials will be updated and are available to download from [planbuild.tas.gov.au](http://planbuild.tas.gov.au)

## Pre Training Checklist

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Complete this checklist before delivering each end-user training course.

### Set up PlanBuild

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- Ensure all participants have a PlanBuild logon
- Ensure all participants have the correct user profile setup for the training
- Review the Training Course content
- Review the scenarios to be covered in the Course
- Set up any applications required for the Scenarios
- Ensure condition and RFI libraries updated
- Ensure fee rates are configured (if upfront payment applicable)
- Ensure templates generate with correct logo
- Test that PlanBuild is accessible from the training room

### Print Resources

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- Print the relevant Training Course Package
- Print the test credit card page (if upfront payment applicable)
- Print feedback survey

### Set up the room

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- Save test documents to the laptops (e.g. plans for the participants to upload)
- Set up the laptops and switch off the timeout for the logon screen
- Open PlanBuild on all laptops

## Other tips

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- Familiarise yourself with the participants. If you expect that someone may require additional assistance, recommend seating them next to another person who you expect can support them in the session.
- Book the room 15-30 minutes before the session to get setup
- Ensure there is a clock in the room and/or ensure you have a watch/phone to keep track of time.

## Technical Tips and Troubleshooting

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### ➤ **Technical Tips**

Prompting manual form completion

PlanBuild works on scheduled processes run automatically by the system periodically (usually every few minutes). When running a training session it will be necessary to manually prompt these processes to avoid waiting for the next scheduled action.

A trainer will likely need to manually prompt the **Form Completion Daemon** during a training session. Upon completing a form (i.e. a permit or certificate), the user will not have access to the finalised PDF document or any stamped/approved documentation until the system has run a scheduled form completion process. In this circumstance, the user will be presented with a message on the Completed summary screen stating *'Processing final document. This should only take a few minutes'*.

To manually complete queued documents the trainer should:

1. Login as 'system' user from the login screen
2. Select 'Administration' from the navigation bar on the left of the screen
3. Select 'System Status' from the dropdown list
4. Select 'Form Completion Daemon' from the options on screen
5. In the expanded 'Form Completion Daemon' section, select 'Start'

Once these steps are completed, all documents should be produced and available to users. If users are waiting for this process on the Completed summary screen, they will need to refresh their browser.

If the 'Start' button on the Form Completion Daemon is locked, it means that the system has recently run this process automatically, or the process has been manually prompted within the last minute.

### ➤ **Troubleshooting**

Issue: User cannot see a task that has been assigned to them.

Check: Ensure that the user is logged into the correct profile-view. For example, where the user is a Council Assessing Officer or Admin Officer, ensure they are logged into their Hobart City Council profile by clicking on their name in the top right hand corner of the PlanBuild screen and selecting 'Hobart City Council'. A tick will appear against the profile the user is currently signed in with.



## Post Training Survey

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### About you -

1. Which area of the Council are you from?
  - Planning
  - Building
  - Plumbing
  - Administration
  - Customer Service
  - Others \_\_\_\_\_

### About the course content -

2. How relevant is the training to your role?
  - Very relevant
  - Somewhat relevant
  - Barely relevant
  - Irrelevant
3. Which part of the training content do you think could be improved (if any):
4. Were you able to get all your questions answered during the training? If not, what is/are your question(s)?
  - Yes, all my questions were answered.
  - No, I would like to know:
5. After the training, how confident are to perform your current work using PlanBuild?
  - Very confident

- I think I can do it with a little assistance or practice.
  - I think I need another / more specific or detailed training.
  - My role doesn't involve using PlanBuild.
6. How do you feel about the amount of information presented in the session?
- Too much
  - Sufficient
  - Not in-depth / comprehensive enough
7. Do you think you would be benefited from a follow-up training session after this?
- Yes. I would like the follow-up session to focus on:
  
  - No.
8. Is there anything else you want to share about / suggest for this training?

**Thank you for attending the PlanBuild Application Services training.**



# PlanBuild

TASMANIA

## Getting Started Training Package

## Getting Started with PlanBuild Tasmania

Course Title – Getting Started	
Time	2 Hours
Audience	<ul style="list-style-type: none"> <li>- All end-users</li> <li>- Council PlanBuild System Administrator</li> </ul>
Requirements/resources	<ul style="list-style-type: none"> <li>- 'Getting Started' PowerPoint Presentation</li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- Business Education Program</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. User registration</li> <li>2. Dashboard Navigation</li> <li>3. PlanBuild Hierarchy and Navigation</li> <li>4. Searching and References</li> <li>5. PlanBuild Statuses</li> <li>6. Managing Clocks</li> <li>7. Document Management</li> <li>8. Notes and Attachments</li> <li>9. Payments</li> <li>10. Allocating Tasks</li> <li>11. Understanding Enquiries</li> </ol>
Learning Outcomes	<p>At the end of the session participants will:</p> <ul style="list-style-type: none"> <li>- Understand the PlanBuild architecture, basic navigation &amp; workflow</li> <li>- Can assign tasks, use workflow &amp; save records</li> <li>- Can use the help &amp; support functionality and tools</li> <li>- Can manage documents including revisions and document control</li> <li>- Can assign &amp; manage task allocation (for specific roles only)</li> </ul>



## User registration

User Registration	
Learning activities	<ol style="list-style-type: none"> <li>1. Create a new user</li> <li>2. Reset your password</li> <li>3. View Organisation Details</li> <li>4. View Licensee Details</li> </ol>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The user registration process is similar to registering for most websites.</li> <li>- The users will be sent an email to verify they have created their user profile.</li> <li>- Councils will have control over creating users and will be able to set these up when new staff start.</li> <li>- Councils will be able to assign the appropriate user role to these users (e.g. Admin, Assessing Officer, etc.)</li> <li>- Users will be able to add an electronic signature to their user profile.</li> <li>- Permit Authorities within a council will be able to link their licence to their user profile.</li> <li>- Users can also delegate their signature to other parties in their organisation (e.g. where a Permit Authority may allow a delegate to sign on their behalf). Note if selected any user with the 'Signatory Delegate' role will be able to apply signatures on their behalf.</li> <li>- Users can have an 'individual' profile and an 'organisation' profile.</li> <li>- User 'Roles' determine what users can do to an application or project. If a user does not have the right permissions they may not be able to view tasks, access documents, view screens etc.</li> </ul>
Questions that may arise	<p><b>Q. Are there any password requirements?</b></p> <p>A: There must be at least 9 characters; and include a lowercase letter, an uppercase letter, and a number.</p> <p><b>Q: What happens if an email address is shared?</b></p> <p>A: A unique email address is required and cannot be used more than once.</p> <p><b>Q: I haven't received the auto email after completing my registration?</b></p>

## User Registration

A: While using the demo environment these will not be sent external to the system – if you have a link that requires to be validated please email [support@planbuild.tas.gov.au](mailto:support@planbuild.tas.gov.au).

**Q: How do I join an organisation which has already been created?**

A: You must be invited to that organisation by a system administrator for that organisation.

## Dashboard Navigation

Dashboard Navigation	
Learning Activities	<ol style="list-style-type: none"> <li>5. Find a task currently assigned to you from the dashboard</li> <li>6. Find and claim a task currently assigned to someone else in your organisation from your dashboard</li> </ol>
Trainer Notes and points to cover	<p>Trainers should demonstrate using the system the following navigation overview:</p> <p><b>PlanBuild Mailbox</b></p> <ul style="list-style-type: none"> <li>- Notifications will appear in your PlanBuild mailbox when certain actions are performed (such as a task being assigned to you).</li> <li>- The email address used when registering will also receive a copy of this notification via email.</li> </ul> <p><b>Logged in user details</b></p> <ul style="list-style-type: none"> <li>- The top right hand of the ribbon menu shows the logged in user details.</li> <li>- This can be used to switch between organisation profiles (if user has multiple), or access profile setting.</li> <li>- This can also be used to 'sign out'.</li> </ul> <p><b>Create a Project</b></p> <ul style="list-style-type: none"> <li>- You can create a project by selecting 'Create a Project' and follow the prompts. This will be covered in detail in 'Creating a Project'.</li> </ul> <p><b>Side bar menu</b></p> <ul style="list-style-type: none"> <li>- Home – Used to return to the dashboard, you can also select the PlanBuild logo in the banner menu to return to the dashboard.</li> <li>- Search – You can select the dropdown to search by different categories. This will be covered in detail in 'Searching'.</li> <li>- Payments – You can see the details of any payments made as an individual or for your organisation.</li> <li>- Reporting – This will only appear if you are required to access the reporting functionality.</li> <li>- Help – This can be used to access additional help resources.</li> </ul> <p><b>Task Filter</b></p> <ul style="list-style-type: none"> <li>- You can search for tasks using the search bar.</li> </ul>

## Dashboard Navigation

- 'Has Outstanding RFI' can be selected to filter out application tasks which have an RFI/Invoice that is yet to be completed by the applicant.
- 'Has Outstanding Referral' can be selected to filter out any active tasks which have been referred (internally or externally) and are outstanding.

### **My Task List**

- This section shows any tasks currently assigned to the logged in user.
- Tasks are allocated to your My Task list when you select a task from the Organisation Tasks or if the task is assigned directly to you.

### **Organisation Tasks**

- This section shows all tasks in the user's organisation, details of who the task is currently assigned to in the 'Assignee' column.
- Tasks can be opened and claimed from this section (regardless if they already have an assignee or not).
- Assigning of tasks by a manager will be covered later.

### **Action buttons**

- Tasks can be opened in the same tab by clicking anywhere along the task row.
- The action buttons for tasks are shown on the right-hand side of each task:
  - o The 'pop-out' icon will open the task in a new tab.
  - o The 'Referrals' icon will show a summary of any (internal/external) referrals associated with the task.

### **Recent Sub Projects**

- The four most recent Sub Projects the user has performed an action on will be displayed here. Select 'See all' to see a complete list.

### **Recently Completed**

- The four most recent forms the user has completed will be displayed here. Select 'See all' to see a complete list.

### **My Properties**

- The four most recent properties the user has performed an action on will be displayed here. Select 'See all' to see a complete list.

## Dashboard Navigation

	<p><b>My Enquiry List</b></p> <ul style="list-style-type: none"><li>- Any Enquiries completed by a user once registered (and whilst logged in) will appear at the bottom of their dashboard. <i>Note: you do not need to be registered to use the Enquiry Service.</i></li></ul>
Questions that may arise	<p><b>Q: I cannot view a task that I should be able to view?</b></p> <p>A: Confirm that the user has the correct Role/Department in PlanBuild. This can be done by a System Administrator using the Organisation Details screens.</p> <p><b>Q: How do I see tasks assigned across the organisation?</b></p> <p>A: Navigate to the 'Tasks' search screen on the navigation bar on the left and use the search criteria to see tasks in your organisation.</p>

## PlanBuild Hierarchy and Navigation

PlanBuild Hierarchy	
Learning Activities	7. Create a project
Trainer Notes and points to cover	<p><b>PlanBuild Hierarchy</b></p> <ul style="list-style-type: none"> <li>- PlanBuild has a hierarchy of: <ul style="list-style-type: none"> <li>o Property</li> <li>o Project</li> <li>o Sub Project</li> <li>o Application</li> <li>o Tasks</li> </ul> </li> <li>- All applications must be related to a property address.</li> <li>- Actions on a project/sub-project are driven by forms or tasks.</li> <li>- Users should be made aware of how to navigate from project, sub-project, to application by using the 'Project Panels'.</li> <li>- The PlanBuild icon in top banner will take the user back to their Dashboard.</li> <li>- The 'Burger' icon will hide the navigation bar on the left.</li> </ul> <p><b>Creating a Project at an unlisted address</b></p> <ul style="list-style-type: none"> <li>- If an external user (i.e. applicant) attempts to create a project for a property which is not available in the LIST, an error message will prompt them to contact the relevant organisation to create on their behalf.</li> <li>- This can be done by council users who have the 'Organisation Project Create' role in PlanBuild, by selecting 'search', then 'projects'. Here there is a button to create a 'New project from an unlisted address'.</li> <li>- Council will need to select the property from the map and include the property data which is known.</li> <li>- Once created, the applicant can be added as a Project Administrator from the Project Summary Screen.</li> </ul>
Questions that may arise	<b>Q. What if the address is unavailable?</b>

## PlanBuild Hierarchy

	A: Property data is retrieved from the LIST. If the address is not available in the LIST, organisations will be able to create an 'unregistered address' if contacted by the applicant to do so (process above).
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## Searching and References

Searching	
Learning Activities	<ol style="list-style-type: none"> <li>8. Search for a property and identify projects and sub-projects recorded for that property</li> <li>9. Search for a specific application form using the Application Search function</li> <li>10. Search and assign a task from one user to another user in your organisation</li> </ol>
Trainer Notes and points to cover	<p><b>Searching</b></p> <ul style="list-style-type: none"> <li>- Searching can occur from the navigation bar on the left</li> <li>- Users can search by a property, project, sub-project or task</li> <li>- Users should be able to view items that their organisation has been involved in (e.g. if an application has been referred to TasWater, TasWater staff should be able to view specific parts of that Project/Sub Project or Application).</li> <li>- Search results can be exported if users search by application. Users should be advised that this may impact on performance so if exporting, endeavour to use specific criteria. If more extensive data is required this should be sought using the PlanBuild Reporting functionality.</li> <li>- Managers can track workload using the Task Search option, with the ability to view across their Department / Organisation.</li> <li>- When searching, applications that have been referred or where a request for information has been requested can be filtered (i.e. these will still be able to be accessed but will not display as 'active' tasks for users to do).</li> </ul> <p><b>PlanBuild References</b></p> <ul style="list-style-type: none"> <li>- PlanBuild creates a unique identifier for a Project, Sub Project and an application.</li> <li>- The prefix for the reference will be the year, however the latter parts of the reference will be randomly generated.</li> <li>- Users can enter their own 'External Reference Number'.</li> <li>- This can be at the user's discretion (e.g. it may be a reference to the organisations records management system).</li> </ul>



## Searching

	<ul style="list-style-type: none"><li>- The External Reference Number will be displayed in the top navigation bar and will be able to be searched using the 'Search' functionality.</li></ul>
Questions that may arise	<p><b>Q. Can councils add their own unique reference numbers?</b></p> <p>A: Council may choose to use the 'External Reference' section to enter an internal reference number. This can then be searched by searching by 'Application'.</p>

## PlanBuild Statuses

PlanBuild Statuses	
<p>Trainer Notes and points to cover</p>	<p><b>Statuses</b></p> <ul style="list-style-type: none"> <li>- PlanBuild applications are largely broken into 4 key statuses – ‘Draft’, ‘Submitted’, ‘Assessment’, ‘Determined’, however statuses may vary depending on the application type</li> <li>- Statuses can be viewed using the ‘Status Chevron’</li> <li>- Users related to a project will have different views of the application status based on the role they have e.g. an applicant will be able to see that an application has been referred to TasWater or Heritage Tasmania, however the applicant will not be able to view the content of the referral.</li> <li>- To move an application from one status to another relies on the completion of certain tasks, for example, ‘Accept Application’ will progress the application to the next status.</li> <li>- In most cases a ‘Review and Confirm’ page will appear if the completing of the task will move an application to a new status in PlanBuild.</li> <li>- Some users will not be able to edit applications in particular statuses (e.g. ‘Assessment’) if they do not have the Assessing Officer role.</li> </ul>
<p>Questions that may arise</p>	<p><b>Q. Can I move an application to a previous status?</b></p> <p>A: No, once an application has moved to a new status you will not be able to move it back. A review &amp; confirm screen has been included in some instances to ensure a permit/certificate/refusal isn’t moved to ‘Completed’ status before it is ready to be issued.</p>

## Managing Clocks

Managing Clocks	
Trainer Notes and points to cover	<p><b>Overview of clocks</b></p> <ul style="list-style-type: none"><li>- Now that users have viewed the statuses, trainers can provide an overview of how the clocks will work.</li><li>- Clocks are set at the form level (e.g. a planning application form will have its own clock)</li><li>- Some forms will not have a clock set (as it does not apply). In these cases the due date will not be displayed.</li><li>- Clocks can be managed by users with the user role to do so</li><li>- Some forms (e.g. a Planning Application) will be determined by the Assessing Officer before they start the assessment clock</li></ul> <p><b>Updating the clock</b></p> <ul style="list-style-type: none"><li>- PlanBuild has included substantial functionality to manage clocks and to ensure that they were not able to be changed without an appropriate process.</li><li>- When an Assessing Officer has selected to start the assessment, the user will select the start date and select the period (e.g. discretionary or permitted). If the planning assessment period needs to be changed after it has been initially set, there are 2 ways in which this can occur:<ol style="list-style-type: none"><li>1. Using the Extension of Time (EOT) request to the applicant, which they must respond to; or</li><li>2. Using the Adjust Assessment Timeframe</li></ol></li></ul> <p><b>Extension of Time</b></p> <ul style="list-style-type: none"><li>- Assessing Officer should use the EOT where a notification is required to an application.</li></ul> <p><b>Adjust Assessment Timeframe</b></p> <ul style="list-style-type: none"><li>- Assessing Officer should use the Adjust Assessment Timeframe when there is an internal reason to change the clock. This allows a user to move the clock back or forward.</li><li>- The Assessing Officer can select themselves if they are authorised to adjust the clock, alternatively they can select</li></ul>

## Managing Clocks

	to send this to another officer who to review and approve the change.
Questions that may arise	<b>Q. How does the system cater for public holidays?</b> A: Where required, certain statutory clocks are set to exclude both state-wide and national public holidays as well as local public holidays that affect particular Local Government Areas, such as a Show Day.

## Document Management

Document Management	
Trainer Notes and points to cover	<p>Trainers to outline how document management works in the system.</p> <p>Prepare for this session by:</p> <ul style="list-style-type: none"><li>○ Creating a sub-project as an Owner</li><li>○ Inviting a Designer,</li><li>○ As the designer, accept the invitation and produce a Certificate of the Responsible Designer (Form 35) within the relevant sub-project (including uploaded relevant documents and plans).</li></ul> <p><b>As the Owner/Applicant make application for a Certificate of Likely Compliance Document overview</b></p> <ul style="list-style-type: none"><li>- A key benefit of PlanBuild is to allow for the sharing of documents with parties involved in the project (e.g. the Applicant, the Council, Referral Authorities, Building Surveyors etc.).</li><li>- When lodging applications, PlanBuild has been set up to allow a user to pick from documents that are available for the sub-project so that these can be passed through to other applications. For example, a Certificate of Responsible Designer can be created by a Designer, shared with an applicant, who can then select the Certificate and the associated plans to be submitted with an Application for CLC.</li><li>- This functionality will be covered in detail in specific subject training courses.</li></ul> <p><b>Revisions</b></p> <ul style="list-style-type: none"><li>- When uploading a document a user will be required to enter the document type, description, revision date, who the document was prepared and licence details of that person if required.</li><li>- The Revision Date is the date on the document itself (e.g. the date on a plan)</li><li>- Users can add one or many documents at once.</li></ul>

## Document Management

- If the user selects to 'Upload and Add Another' as part of the same upload process the document type will be the same for both documents.
- Council users may need to correct the document details when they are submitted (e.g. if the applicant uploads a single pdf including a suite of documents, the council may choose to separate these into their own unique documents.

### **Available Documents vs Supporting Documents**

#### **For an Applicant:**

- Most applications will include two sections – Available Documents and Supporting Documents.
- The purpose of the Available Documents section is to display to an applicant the documents that are available on the sub-project that they may want to re-use for the purpose of lodging a new application that requires a document that has been uploaded but for a different application, for example plans.
- If there are no documents in the 'Available Documents' section it means that there are no previously uploaded documents for that sub-project.
- Applicants have the option to move documents from Available Documents to Supporting Documents so that they are submitted to the approving body with that particular application.
- The Supporting Documents section is displayed to the applicant to show them any documents that they have selected from the Available Documents section and allowing them to add any New Documents to be submitted with their application.

#### **For an approval body:**

- When an application is submitted, the documents that the applicant has selected as Supporting Documents as part of the application will be available for the Council/Referral Authority to view.
- The Assessing Officer can then select some or all of these documents to be included in the 'Document Pack'. 'These are the documents that are considered / used during the assessment (e.g. correct version of a site plan) and will be

## Document Management

	<p>provided back to the applicant when the assessment is finalised.</p> <ul style="list-style-type: none"><li>- Where the application is approved, documents that are in the Document Pack can be stamped to show they are approved documents.</li><li>- This will be covered in more detail in specific subject training courses.</li></ul>
Questions that may arise	<p><b>Q. I cannot find the appropriate attachment type for my upload</b></p> <p>A: If there is not a specific 'Document Type' for your document, use 'Other'</p> <p><b>Q. I have submitted my application but want to view the documents that I uploaded to support it</b></p> <p>A: An Applicant can navigate to the 'Draft' status of a submitted application form to view all documents uploaded.</p> <p><b>Q. I do not want to stamp all pages of a document, how can I separate?</b></p> <p>A: An Assessing Officer can download a document and make required edits (external stamping, mark-ups or removing pages) and re-upload the document as either a new document or a revision of an existing document.</p> <p><b>Q. I have received a revised version of a document outside of PlanBuild, how can I record this against the application?</b></p> <p>A: An Assessing Officer can add a new document from within their assessment screen.</p>

## Notes and Attachments

Notes and Attachments	
<p>Trainer Notes and points to cover</p>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>- The internal notes and attachments section can be used to capture internal notes, which will not be viewable by users outside your organisation (e.g. the Applicant).</li> <li>- In some instances the notes section can be used if re-assigning a task to add details to another user for specific action required of them (your organisation will instruct you on your business process for the use of notes).</li> <li>- Notes will be automatically timestamped and details of the logged in user will be applied so there is no need to include this in your note.</li> <li>- Notes made on an assessment screen will also be shown on the Sub-Project Summary Screen. On this screen the particulars of the note as well as who made the note, on which form the note was made and the date of the note will be visible to all other users within the Organisation. Users not within the organisation will not have access to the note summary.</li> </ul> <p><b>Attachments</b></p> <ul style="list-style-type: none"> <li>- To upload an attachment, you can toggle to the 'Attachment' tab. Here you can store any correspondence with an applicant that was made externally of PlanBuild (e.g. emails).</li> </ul>
<p>Questions that may arise</p>	<p><b>Q. Who can view the internal notes and attachments section?</b></p> <p>A: As all users within your organisation have viewer access, anyone within your organisation can navigate to screen containing the notes and attachment section and view details.</p> <p>These notes will not be visible to anyone outside your organisations (e.g. the Applicant or Referral Authorities).</p>



## Payments

Payments	
Trainer Notes and points to cover	<p>Trainers to provide an overview of how payments will be received and viewed using PlanBuild.</p> <ul style="list-style-type: none"><li>- Prior to training confirm if organisation is adopting upfront payments. PlanBuild will charge upfront if the organisation fee rates are within PlanBuild.</li><li>- Payments can be made using credit card or BPay.</li><li>- Credit card payments over \$100,000 is not permitted.</li></ul> <p><b>Upfront payments only</b></p> <ul style="list-style-type: none"><li>- Fees will be calculated based on the fee types configured against the forms and per the council fee type structure.</li><li>- When making a payment, the user can select the payment type from credit card or BPay.</li><li>- There is a third option for 'office use only' this will allow the application to be submitted without making a payment. The user will need to provide a reference as to why they are eligible for a discount or waiver, and it will be clear to the council that a payment has not been made.</li><li>- If additional payments are required after submission, a user can raise a request for payment after the application has been submitted.</li></ul> <p><b>Requests for Payment</b></p> <ul style="list-style-type: none"><li>- If councils are not adopting upfront payments, a user can raise a request for payment after the application has been submitted.</li><li>- Applicants will receive notification from PlanBuild and</li><li>- This will create a task for the applicant to log in and make a payment using credit card or BPay (they will receive an email notification about the task).</li></ul> <p><b>Payment Details</b></p> <ul style="list-style-type: none"><li>- Any user within your organisation has the ability to search for payment details for applications.</li><li>- If a payment has been made, a button under the task description on the submitted and assessment screens will take the user to any payment details associated with the application.</li></ul>

## Allocating Tasks

Managing task allocation (for specific roles only)	
Trainer Notes and points to cover	<p><b>Allocating Tasks</b></p> <ul style="list-style-type: none"> <li>- Where multiple users are set up as admin or Assessing Officer within a department, a new application/task will be 'Unassigned' upon progressing. For example, when a new planning application is received and the council has more than one user set up with the Administration role within the Planning department, the application will be unassigned. Where there is a single user with the relevant permissions, all relevant task will be assigned to them directly.</li> <li>- Tasks can be assigned to other users as required</li> <li>- Users who have the 'Work Admin' user role will be able to reassign tasks in bulk (e.g. where a party is unwell/on leave a manager will be able to select all of that user's task and reassign to another party. This is done via the task search function, where the user can search for tasks based on assignee, select all tasks and choose the user to assign them all to.</li> <li>- Tasks can be allocated from within the submitted/assessment screen by anyone with the permission to claim the task. This is done by claiming the task (if not already claimed) and selecting the purple button with the current claimer's detail on it. A dialog box will be presented and the user will have access to a dropdown list of all org users with the relevant permissions for the application in its current status. Selecting a user and clicking 'Reassign' will move the current task to the selected user's Task List.</li> </ul>
Questions that may arise	<p><b>Q. My profile does not have the ability to allocate tasks?</b></p> <p>A: You need to have the 'Work Admin' role in PlanBuild to be able to assign/re-assign tasks from the task search screen.</p>

## Understanding Enquiries

Understanding Enquiries	
Trainer Notes and points to cover	<p><b>Enquiry Service</b></p> <ul style="list-style-type: none"><li>- The Enquiry service allows anyone to enter an address in the portal to see what planning zones and codes apply to a property.</li><li>- A Property Report can be generated which includes maps, details of the planning zone, codes and other information that affect the selected property.</li><li>- For those properties that fall under the Tasmanian Planning Scheme, PlanBuild provides a comprehensive Guided Enquiry service, including identifying, planning, building and plumbing rules that may apply to a proposed project.</li><li>- A proposed project could include changes to your residential property, such as building a deck, adding a deck or doing internal renovations.</li><li>- PlanBuild will also provide information on food businesses and operating a risk-based business, such as a tattoo parlour that requires specific licenses.</li><li>- You will be able to work through a series of questions on your proposed project resulting in information on:<ul style="list-style-type: none"><li>o who to consult (e.g. local council, Heritage Tasmania)</li><li>o who can do the work (e.g. a licensed builder)</li><li>o what to apply for (e.g. a permit).</li></ul></li><li>- After completing an enquiry if you have additional questions or want to request advice from a council, this can be lodged online using PlanBuild.</li></ul> <p><b>How does the Enquiry Service link to Application Services</b></p> <ul style="list-style-type: none"><li>- Any enquiries undertaken, whilst registered and logged in will be saved at the bottom of the user's PlanBuild Dashboard.</li><li>- The user can refer back to previous saved enquires using the dashboard.</li></ul>



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## Planning Application Administration Training Package

## Planning Application Administration Training Course

Course Title – Planning Application Administration Training Course	
Time	4 hours (One day)
Audience	Planning Administration Officers
Requirements/resources	<ul style="list-style-type: none"> <li>- Planning Application at Submitted Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> <li>▪ Test Credit Card Details</li> </ul> </li> </ul> </li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<p>Overview of available applications for planning context</p> <ol style="list-style-type: none"> <li>1. Administer a planning application           <ol style="list-style-type: none"> <li>1.1 that requires no action to be moved to Assessing Officer</li> <li>1.2 that requires a payment &amp; RFI</li> <li>1.3 that requires to be rejected</li> <li>1.4 for a subdivision (optional)</li> </ol> </li> <li>2. Overview of assessment process to progress applications to Advertising (Assessing Officer Role)</li> <li>3. Action an advertising request from the Assessing Officer for a Discretionary Planning Application           <ol style="list-style-type: none"> <li>3.1 generate advertising templates</li> <li>3.2 generate adjoining properties report</li> <li>3.3 manually add a representation</li> </ol> </li> <li>4. Administrative revisions of a permit</li> <li>5. Record Notice of Appeal</li> <li>6. Receive a Planning Condition Endorsement</li> <li>7. Receive and approved withdrawal request</li> </ol>

**Course Title – Planning Application Administration Training Course**

	7.1 With a refund request
Learning Outcomes	<p>At the end of the session review this list and confirm participants know how to:</p> <ul style="list-style-type: none"><li>- Receive a Planning Application</li><li>- Review a submitted Planning Application</li><li>- View, download &amp; edit documents</li><li>- Request further information &amp; internal/external referrals</li><li>- Find &amp; acknowledge a referral response</li><li>- Request and accept a payment</li><li>- Check planning application is complete &amp; generate task to assessing officer for validation</li><li>- Receive and complete tasks</li><li>- Find &amp; view a completed Planning Permit</li><li>- Complete conditioning endorsement</li><li>- Amend a Planning Permit</li><li>- Manage Appeals</li><li>- Withdrawal requests</li><li>- Capturing Refund details</li></ul>

## Administer a Planning Application

Administer a Planning Application	
Learning activities	<ol style="list-style-type: none"> <li>1. Administer a Planning Application               <ol style="list-style-type: none"> <li>1.1 that requires no action to be moved to Assessing Officer that requires a payment &amp; RFI</li> <li>1.2 that requires to be rejected</li> <li>1.3 for a subdivision (optional)</li> </ol> </li>   <li>2. Overview of assessment process to progress applications to Advertising (Assessing Officer Role)</li> </ol>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- For Planning Applications in PlanBuild, there are two 'Submitted' statuses. The first stage is when a council user with the Admin Officer roles can check an application is complete, including checking CoT, Documents and application details.</li> <li>- Applications will not be able to be edited by Admin staff at this stage, if further information or payment is required, a request can be raised at this status, and/or when progressed to the Assessing Officer.</li> <li>- In the case of missing or incorrect information provided in the applications, recommend that RFI is undertaken instead of rejecting the application, as payment has already been received.</li> <li>- If upfront payments are used, there is an option for the applicant to select 'Office Use Only' which will prompt the applicant to enter a reference (foreseen to be given to them prior to lodgement by council) which will allow the application to be submitted without payment. An invoice can then be raised for part or full payment, this will allow for discounts/fee waiver if required.</li> <li>- Council can instruct applicants to use the 'Office Use Only' checkbox and give them a reference number to enter on submission. If the checkbox is selected, and an application is submitted without payment it will be clear to council a payment has not been made on the form.</li> <li>- If know the assessment timeframe can be set at this stage however this is not final, and the Assessing Officer can change that before starting the statutory clock.</li> </ul>

## Administer a Planning Application

	<ul style="list-style-type: none"> <li>- Review Payment Details both on the submitted/assessment page ('Go to Payments' button in task section) and/or Payment search.</li> <li>- Check Certificate of Title – applicants can purchase or upload when lodging the application. Purchase will offer them all title documents relevant for a Planning Application, specifically:             <ul style="list-style-type: none"> <li>o Folio Plan and Folio Text combined</li> <li>o Schedule of Easements and Folio Plan combined</li> <li>o Folio Plan and Survey Notes combined</li> <li>o Unregistered Dealings</li> <li>o Plan-related documents</li> </ul> </li> <li>- Relevant Property Title/s box – this section is used for the applicant to nominate which title(s) the application is for (if multiple apply).</li> <li>- Overview of Documents – see 'Document Management' in Getting Started course for detailed notes.</li> <li>- The 'Owner' section is set at the project level.</li> <li>- Once ready for the application to be viewed by an Assessing Officer, Administration Officers can acknowledge the application.</li> <li>- Once acknowledge, the application will be moved to a second 'Submitted' status where a user with the Assessing Officer role can review and accept the application as being 'valid' before the assessment timeframe begins.</li> </ul>
<p>Questions that may arise</p>	<p><b>Q: If I accept the application will the statutory clock commence?</b></p> <p>A: No, the application will be progressed to a user with the 'Assessing Officer'.</p>
<p>Post training exercises (optional)</p>	<ul style="list-style-type: none"> <li>• Review an application for Subdivision</li> <li>• Review an application for General Managers Consent</li> </ul>



## Advertise an application

Advertising	
Learning activities	<p>3. Action an advertising request from the Assessing Officer for a Discretionary Planning Application</p> <ul style="list-style-type: none"> <li>3.1 generate advertising templates</li> <li>3.3 generate adjoining properties report</li> <li>3.4 manually add a representation</li> </ul>
Trainer Notes and points to cover	<p><b>Who can do the process</b></p> <ul style="list-style-type: none"> <li>- The advertising process could be undertaken by the Assessing Officer or an Admin Officer.</li> <li>- Where it is undertaken by the Admin Officer, the Assessing Officer will generate a task for the Admin Officer to action.</li> <li>- The Assessing Officer can use the 'Advertising Request' task to nominate the details/documents the Admin Officer must use for the advertisement.</li> <li>- The Assessing Officer has the ability to create the advertisement by selecting 'Advertise' in the 'Advertisement' section, this will give the same functionality to the Assessing Officer as it would an Admin Officer when using the request option.</li> <li>- Once advertised both the Assessing Officer and Admin Officer can view and add to the advertisement section (e.g. adding a rep received externally) by opening the advertisement section from the parent assessment screen.</li> </ul> <p><b>Advertising period</b></p> <ul style="list-style-type: none"> <li>- The advertising period will be able to be set by the user when creating the advertisement.</li> <li>- At this stage the period cannot be less than 14 days per the <i>Land Use Planning and Approvals Act 1993</i>.</li> </ul> <p><b>Adjoining properties report</b></p> <ul style="list-style-type: none"> <li>- There is the ability to generate a csv report that will include a list of all adjoining properties. This is done automatically by the system by expanding the boundary of the current property by a given amount and then querying the LIST for any properties that intersect that expanded boundary.</li> </ul>

## Advertising

- Council may have an existing system that allows a user to select a wider neighbouring set and therefore they may choose to rely on existing systems and processes.
- Whilst the CSV will include address information it will not include owner information.
- The CSV can be used with an existing council mail merge process.

### Templates

- Templates have been included in PlanBuild to allow the Admin Officers to generate site notices and neighbour notifications.
- Templates generated can be opened in Word and sent to relevant parties following existing processes.

### Representations

- Once advertised, representations can be lodged online using PlanBuild.
- Once a representation has been submitted representors will receive a code that they can use if they subsequently choose to withdraw their representation.
- Once the advertising period that representations can be lodged, lapses, representors will not be able to lodge a representation using PlanBuild.
- Council users will be able to 'manually' add a representation at their discretion (i.e. to add in those received outside PlanBuild).
- When a representation is received, a notification is sent to the Assessing Officer.

### Withdrawing a representation

- Representors can withdraw their representation online.
- Where the representor contacts council directly to withdraw, an Admin Officers can manually update the representation.

### Withdrawing or cancelling an advertisement

- Council can withdraw a currently advertised application during the period.
- If withdrawn the council has the option to 're-advertise' the same advertisement (if no changes are required) but must select a new period which cannot be less than 14 days.

## Advertising

	<ul style="list-style-type: none"><li>- If changes are required to the advertisement or advertised document, a new advertisement (or request) will need to be created from the parent assessment screen.</li></ul>
Questions that may arise	<p><b>Q: Will the advertisement be shown on the Council's website automatically?</b></p> <p>A: The published advertisement will be shown in the PlanBuild Enquiry Service, Councils can insert hyperlink in the Council website to link to the page.</p>

## Administrative Revision of a Planning Permit

Administrative Revision of a Planning Permit	
Learning activities	4. Administrative revisions of a permit
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, an admin or assessing user can commence an administrative revision to an issued permit.</li> <li>- This process can be used in the circumstance where a permit has been issued with an error/omission, approved instead or refused or visa-versa.</li> <li>- The user will select the Planning Application Form from the sub-project summary screen. Once on the 'Draft' status, the user will be prompted to select the related permit that this revision relates to.</li> <li>- The user can then progress the application through Draft and 'Submitted' statuses. The application will be moved to the 'Assessment' status, where any changes can be made by an assessor user.</li> <li>- An assessor can then make required changes on the assessment screen and either issue or refuse the permit.</li> <li>- Upon completion, the Applicant and Owner will receive notification of a permit being issued.</li> <li>- The status of the relevant, previously-completed, permit will be changed to 'superseded'.</li> </ul>
Questions that may arise	<p><b>Q: Who will be notified when I mark as complete?</b></p> <p>A: Any party who was notified of the original determination will be notified. All parties with access to the project/sub project will be able to view the completed screen.</p> <p><b>Q: Will the revised permit have the same reference number?</b></p> <p>A: No. The Permit will be issued with a new reference number. If using the 'external reference' override, council can use the same reference number as the original Permit 'external reference'.</p>

## Record Notice of Appeal

Record Notice of Appeal	
Learning activities	5. Record Notice of Appeal
Trainer Notes and points to cover	<p><b>Record Notice of Appeal</b></p> <ul style="list-style-type: none"> <li>- This form can be created by a council user from the Sub Project page.</li> <li>- Use this form to record a notice of appeal. This form will also allow you to capture the date that the documents were provided to TasCAT. On completion of this form, the status of planning permit application will be updated to be 'Appeal Recorded'.</li> <li>- When the appeal outcome is advised, you can record the outcome using the 'Record Appeal Outcome and Amend Permit' or the 'Record Appeal Outcome and Cancel Permit' form, depending on the decision made by TasCAT.</li> </ul>
Questions that may arise	<p><b>Q: Is this form used to record the outcome of the appeal?</b></p> <p>A: No, this is to place the permit in an 'Appealed' status in PlanBuild. A separate process is required to record the outcome of the appeal (see next page).</p>

## Planning Condition Endorsement

Planning Condition Endorsements	
Learning activities	6. Receive a Planning Condition Endorsement
Trainer Notes and points to cover	<p><b>Lodgement (Applicant)</b></p> <ul style="list-style-type: none"> <li>- Applicants will be able to create the 'Application for Condition Endorsement' form from the Sub Project summary page.</li> <li>- They have a table on the application form which they can list the condition number or name, relevant documents or information, document reference.</li> </ul> <p><b>Administration</b></p> <ul style="list-style-type: none"> <li>- The condition endorsement application will follow a similar workflow in PlanBuild as an Application for Planning Permit.</li> <li>- Admin Officers will receive a task to review the application and start the assessment (note: unlike the Application for Planning Permit the assessing officer will not have a second 'Submitted' status to review the application).</li> <li>- The admin officer has the ability to reject the application at the 'Submitted' status. Whereas the assessing office can refuse the application at the 'Assessment' status.</li> </ul>

## Withdrawal Requests

Receive request to withdraw an application	
Learning activities	<p>7. Receive and approve a request to withdraw an application</p> <p>7.1 with a refund request</p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild an applicant can use a form titled 'Withdrawal Request' to withdraw an application that has been submitted to council and is in the 'Submitted' or 'Assessment' status.</li> <li>- An applicant must provide a reason for referral with their request.</li> <li>- The applicant must select from a list of council users to receive the request. The user who has claimed the parent application would be listed as 'assignee'.</li> <li>- Upon submission, the selected council user will have a task to review the Withdrawal Request. The council user can make comments on this form and either 'Confirm' or 'Reject' the withdrawal.</li> <li>- If confirmed, the withdraw request will be completed and associated with the relevant permit. The status of the relevant certificate/permit application will be changed to 'Withdrawn', the reason for referral will be displayed on the 'Withdrawn' status.</li> </ul>
Questions that may arise	<p><b>Q: What if an applicant requests to withdraw their application outside of PlanBuild (email/phone call etc.).</b></p> <p>A: The council user can either direct the user to use PlanBuild or submit the Withdrawal Request on the Applicant's behalf.</p>



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## Planning Application Assessment Training Package



## Planning Application Assessment Training Course

Course Title – Planning Application Assessment Training Course	
Time	8 hours (One day)
Audience	Planners
Requirements/resources	<ul style="list-style-type: none"> <li>- Planning Application in the Assessment Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> </ul> </li> </ul> </li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<p>Overview of available applications for planning context</p> <ol style="list-style-type: none"> <li>1. Review a Planning Application           <ol style="list-style-type: none"> <li>1.1 where no further action is required to progress to assessment</li> <li>1.2 that requires an additional payment &amp; RFI</li> <li>1.3 that requires Heritage review (Interest/No Interest)</li> </ol> </li> <li>2. Assess a permitted planning application that needs an internal DE referral</li> <li>3. Assess a Discretionary application           <ol style="list-style-type: none"> <li>3.1 that needs to be referred to Heritage Tasmania</li> <li>3.2 that needs to be referred to TasWater</li> <li>3.3 with advertising request, review advertised applications</li> <li>3.4 receive a representation</li> <li>3.5 request an extension of time</li> </ol> </li> <li>4. Issue a Planning Permit approval with conditions           <ol style="list-style-type: none"> <li>4.1 with external referral authority conditions</li> </ol> </li> </ol>

**Course Title – Planning Application Assessment Training Course**

	<p>5. Issue a Planning Permit refusal with reasons (optional)</p> <p>6. Administrative revisions of a permit</p> <p>7. Record appeal outcome and generate Permit</p> <p>8. Assess a Planning Condition Endorsement</p> <p>9. Issue a Subdivision Determination (optional)</p>
<p>Learning Outcomes</p>	<p>At the end of the session review this list and confirm participants know how to:</p> <ul style="list-style-type: none"> <li>- Validate a submitted Planning Application</li> <li>- Review the Planning Application</li> <li>- View, download &amp; edit documents</li> <li>- Request further information and internal/external referrals</li> <li>- Request &amp; accept an additional payment</li> <li>- Move application from submitted to assessment</li> <li>- Manage the clock</li> <li>- Request an advertisement of a Discretionary Application</li> <li>- Complete a planning application assessment in PlanBuild</li> <li>- Stamp and sign documents</li> <li>- Add conditions</li> <li>- Request an extension of time</li> <li>- Approve &amp; issue a Planning Permit</li> <li>- Reject or refuse an Application</li> <li>- Find &amp; view a completed Planning Permit</li> <li>- Complete conditioning endorsement</li> <li>- Amend a Planning Permit</li> <li>- Manage Appeals</li> </ul>

## Review a Planning Application

Review a Planning Application	
Learning activities	<p>1. Review a Planning Application</p> <p>1.1 where no further action is required to progress to assessment</p> <p>1.2 that requires an additional payment &amp; RFI</p> <p>1.3 that requires Heritage review (Interest/No Interest)</p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Planning Applications submitted by applicants will be initially assigned to users with an Admin Role.</li> <li>- Planners and others users with the Assessing Officer role will receive a task to review a new planning application after the Admin Officer has completed the initial review.</li> <li>- It is expected that by the time the application is referred to the Assessing Officer, the necessary steps have been taken to confirm that the application is valid and any required payments are made</li> <li>- Admin Officers will be able to view applications once they have referred for assessment but they will not be able to update the application unless they have the user permissions to do so</li> <li>- At the second 'Submitted' status the Assessing Officer can perform referrals (internal and external), request further information or payment and view application details.</li> <li>- The assessing officer will need to set the assessment timeframe by selecting the start date and the timeframe (i.e. permitted).</li> <li>- You can see the dates at the bottom of the status chevron for each status, if an application is determined to be valid on the date it was submitted, you will be able to see the submitted date at the bottom of the 'Submitted' status chevron. Use this as the start date for the assessment, PlanBuild will then calculate the assessment period based on that date and the period.</li> <li>- Once you select 'Start Assessment' the statutory clock will commence. The assessment timeframe can be adjusted once the assessment begins if required.</li> </ul>
Questions that may arise	<p><b>Q: Does the calculated assessment timeframe consider public holidays?</b></p> <p>A: Yes, each LGA has their own calendar configured so only statutory days for your particular council will be counted in the calculation.</p>

## Assess a Permitted Application

Assess a permitted application	
Learning activities	2. Assess a permitted planning application that needs an internal DE referral
Trainer Notes and points to cover	<p><b>Assessment</b></p> <ul style="list-style-type: none"> <li>- Permitted applications have an assessment timeframe of 28 days.</li> <li>- Before the application will have reached the 'Assessment' status the necessary administration checks will have been undertaken and the assessing officer has reviewed, confirmed the application is valid and started the assessment.</li> <li>- At this status the Assessing Officer can: <ul style="list-style-type: none"> <li>o perform referrals (internal and external);</li> <li>o request further information and/or payment;</li> <li>o view application details;</li> <li>o generate the assessment report;</li> <li>o record details of the assessment;</li> <li>o view, edit and stamp document;</li> <li>o apply condition from the library;</li> <li>o preview the output (permit or refusal); and</li> <li>o approve/refuse and issue outputs (can assign the assessment task to Senior Planner/other users to issue)</li> </ul> </li> <li>- 'Preview output' can be used to see what the output (permit or refusal) will look like. To preview a permit, select 'Approve and Issue' and then on the review and confirm screen, select 'Preview Output'. If changes are required, you can cancel out and make further changes on the assessment page.</li> </ul> <p><b>Development Engineer Referral</b></p> <ul style="list-style-type: none"> <li>- Internal Referrals can be triggered from the parent assessment screen by using the 'Generate Request, Referral or Invoice' section and selecting 'Internal Referral'.</li> <li>- You will be prompted to select the recipient (For the purpose of training, the recipient can be an individual or dummy users set up for departments).</li> </ul>

## Assess a permitted application

	<ul style="list-style-type: none"> <li>- The referral report type selected will nominate which type of internal referral you are making (i.e. Environmental Development Planner, Development Engineer, Cultural Heritage etc.).</li> <li>- The planning assessing officer can set the referral timeframe in line with statutory time to raise an RFI to the applicant or internal KPIs.</li> <li>- If the referred to party requires further information/documents they can perform a request for information and nominate the items/request from a library.</li> <li>- An RFI from a referred to party will return to the assessing officer with the parent assessment claimed who acts as the 'project manager' for the application.</li> <li>- A consolidated RFI can be created to go to the Owner/Applicant where the assessing officer can add all RFI items from internal referrals from a library into a single request.</li> <li>- Once a response is received, the Assessing Officer will receive a task to acknowledge the response and resume the clock if required. The Assessing Officer can then provide the response to the relevant internal party, where if the information is insufficient the same Internal Referral / RFI process can be repeated.</li> <li>- The referred to party can nominate conditions which must be included on the Planning Permit, these will be able to be selected by an Assessing Officer on the parent application in the 'Conditions' section by selecting '+Add Referral Condition'.</li> <li>- Assessing Officer will receive a task to confirm the completion of the referral and will be able to see the details/conditions supplied by the referred to party.</li> </ul>
<p>Questions that may arise</p>	<p><b>Q: When exactly will the clock resume after an RFI?</b></p> <p>A: The clock resumes when the Admin Officer / Assessing Officer select 'Save and Acknowledge' after receiving the response.</p>

## Assess a Discretionary Application

Assess a discretionary application	
Learning activities	<p>3. Assess a discretionary application</p> <p>3.1 that needs to be referred to Heritage Tasmania</p> <p>3.2 that needs to be referred to TasWater</p> <p>3.3 with advertising request, review advertised applications</p> <p>3.4 receive a representation</p> <p>3.5 request an extension of time</p>
Trainer Notes and points to cover	<p><b>Assessment</b></p> <ul style="list-style-type: none"> <li>- Permitted applications have an assessment timeframe of 28 days.</li> <li>- Before the application will have reached the 'Assessment' status, the necessary administration checks will have been undertaken and the Assessing Officer has reviewed, confirmed the application is valid and selected to start the assessment.</li> <li>- At this status the Assessing Officer can: <ul style="list-style-type: none"> <li>o perform referrals (internal and external);</li> <li>o request further information or payment;</li> <li>o view application details;</li> <li>o request advertising / generate advertisements;</li> <li>o generate the assessment report;</li> <li>o record details of the assessment;</li> <li>o view, edit and stamp document;</li> <li>o apply condition from the library;</li> <li>o preview the output (permit or refusal); and</li> <li>o approve/refuse and issue outputs (can assign the assessment task to senior planner/other users to issue)</li> </ul> </li> <li>- 'Preview Output' can be used to see what the output (permit or refusal) will look like. To preview a permit select 'Approve and Issue' and then on the review and confirm screen, select 'Preview Output'.</li> </ul>

## Assess a discretionary application

If changes are required you can cancel out and make changes to the assessment screen.

### **External Referral (Heritage Tasmania / TasWater)**

- External Referrals can be triggered from the parent application page by using the 'Generate Request, Referral or Invoice' section and selecting the relevant party
- The Planning Assessing Officer can set the referral timeframe in line with statutory time to raise an RFI to the applicant or internal KPIs.
- If the referred to party requires further information/documents they can perform a Request for Information and nominate the items/request from a library.
- An RFI from a referred to party will return to the Assessing Officer of the parent assessment claimed who acts as the 'project manager' for the application.
- A consolidated RFI can be created to go to the Owner/Applicant where the assessing officer can add all RFI items from external referrals from a library into a single request.
- Once a response is received the Assessing Officer will receive a task to acknowledge the response and resume the clock if required. The Assessing Officer can then provide the response to the relevant external party, where if the information is insufficient the same process can be repeated.
- The referred to party can nominate conditions which must be included on the Planning Permit, these will be able to be selected by an Assessing Officer on the parent application in the 'conditions' section by selecting '+add referral condition'.
- Assessing Officers will receive a task to confirm the completion of the referral and will be able to see the details/conditions supplied by the referred to party.

### **Advertising Requests**

- The advertising process could be undertaken by the Assessing Officer or an Admin Officer.
- Where it is undertaken by the Admin Officer, the Assessing Officer will generate a task for the Admin Officer to action.
- The Assessing Officer can use the 'Advertising Request' task to nominate the details/documents the Admin Officer must use for the advertisement.

## Assess a discretionary application

- The Assessing Officer has the ability to create the advertisement by selecting 'Advertise' in the 'Advertisement' section, this will give the same functionality to the Assessing Officer as it would to an Admin Officer when using the request option.
- Once advertised both the Assessing Officer and Admin Officer can view and add to the advertisement section (e.g. adding a rep received externally) by opening the advertisement section from the parent assessment screen.

### Advertising period

- The advertising period will be able to be set by the Admin Officer.
- At this stage the period cannot be less than 14 days per the *Land Use Planning and Approvals Act 1993*.

### Representations

- Once advertised, representations can be lodged online using PlanBuild.
- Once a representation has been submitted representors will receive a code that they can use if they subsequently choose to withdraw their representation.
- Once the advertising period that representations can be lodged, lapses, representors will not be able to lodge a representation using PlanBuild.
- Council users will be able to 'manually' add a representation at their discretion (i.e. those received outside PlanBuild).
- When a representation is received, a notification is sent to the Assessing Officer.

### Withdrawing a representation

- Representors can withdraw their representation online.
- Where the representor contacts council directly to withdraw, an Admin Officer can manually update the representation.

### Updating the clock

- PlanBuild has included substantial functionality to manage clocks and to ensure that they were not able to be changed without appropriate process.
- When an Assessing Officer has selected to start the assessment, the user will select the start date and select the period (e.g. discretionary or permitted). If the planning assessment period needs to be



## Assess a discretionary application

	<p>changed after it has been initially set, there are 2 ways in which this can occur:</p> <ol style="list-style-type: none"><li>1. Using the Extension of Time (EOT) request to the applicant, which they must respond to; or</li><li>2. Using the Adjust Assessment Timeframe</li></ol> <p><b>Extension of Time</b></p> <ul style="list-style-type: none"><li>- Assessing Officer should use the EOT where a notification is required to an application</li></ul> <p><b>Adjust Assessment Timeframe</b></p> <ul style="list-style-type: none"><li>- Assessing Officer should use the Adjust Assessment Timeframe when there is an internal reason to change the clock. This allows a user to move the clock back or forward.</li><li>- The Assessing Officer can select themselves if they are authorised to adjust the clock, alternatively they can select to send this to another officer who to review and approve the change.</li></ul>
Questions that may arise	<p><b>Q: What if the applicant does not check my EOT request? Can I call them and put in the response myself?</b></p> <p>A: Council can use the 'Adjust Assessment Timeframe' form for this purpose and add the comment/note that applicant has approved.</p>

## Issue a Planning Permit

Issue a Planning Permit	
Learning activities	<p>4. Issue a Planning Permit approval with conditions</p> <p>4.1 with external referral authority conditions</p>
Trainer Notes and points to cover	<p><b>Issuing the permit</b></p> <ul style="list-style-type: none"> <li>- Your organisation will have a process for who is responsible for issuing a permit, anyone with the 'Assessing Officer' role can issue a permit once it has been signed by someone with the 'Signatory' or 'Signatory Delegate' role(s).</li> <li>- A notification will be sent 42 and 14 days prior to the expiry date of the permit.</li> </ul> <p><b>Previewing the permit</b></p> <ul style="list-style-type: none"> <li>- Reminder to users that they can preview what the permit template will look like for the applicant using the 'Preview Output' checkbox before they 'Confirm' sending to the applicant.</li> </ul> <p><b>Notifying others of the permit</b></p> <ul style="list-style-type: none"> <li>- PlanBuild has been configured to generate auto notifications when certain actions are taken.</li> <li>- On confirmation of approving a planning permit, the applicant will be sent a notification as well as referral authorities that have been related to the permit (e.g. Heritage Tasmania and TasWater).</li> <li>- PlanBuild will send 'standard' auto-notifications. If the council wants to add further information for the applicant, they can upload a template document to the portal that outlines further detail (if the details are not fully covered by the permit itself).</li> <li>- An expiry notification will be sent to the applicant when the expiry date of the permit is 42 and 14 days away.</li> </ul>
Questions that may arise	<p><b>Q: What happens if I send a permit in error?</b></p> <p>A: An Administrative Amendment form is available for all council issued permit/certificate types. This simple form can be commenced by either the Admin or Assessing Officer user from the relevant department. Issue of an Administrative Amendment will supersede the original permit or certificate.</p>

## Refuse a Planning Application

Issue a Planning Permit	
Learning activities	5. Issue a Planning Permit refusal with reasons (optional)
Trainer Notes and points to cover	<p><b>Issuing the refusal</b></p> <ul style="list-style-type: none"> <li>- Your organisation will have a process for who is responsible for issuing a refusal, anyone with the 'Assessing Officer' can issue a refusal once it has been signed by someone with the 'Signatory' or 'Signatory Delegate' role(s).</li> </ul> <p><b>Previewing the refusal</b></p> <ul style="list-style-type: none"> <li>- Reminder to users that they can preview what the refusal template will look like for the applicant using the 'Preview Output' checkbox before they 'Confirm' sending to the applicant.</li> </ul> <p><b>Notifying others of the outcome</b></p> <ul style="list-style-type: none"> <li>- PlanBuild has been configured to generate auto notifications when certain actions are taken</li> <li>- On confirmation of refusing a planning permit, the applicant will be sent a notification, as well as the referral authorities that have been related to the permit (e.g. Heritage Tasmania and TasWater).</li> <li>- PlanBuild will send 'standard' auto-notifications. If the council wants to add further information for the applicant, they can upload a template document to the 'Assessment Documents' section that outlines further detail (if the details are not fully covered by the permit itself).</li> </ul>
Questions that may arise	<p><b>Q: What happens if I send a refusal in error?</b></p> <p>A: Unlike an approval, there is no concept of an administrative amendment to a refused planning application.</p>

## Administrative Revision of a Planning Permit

Administrative Revision of a Planning Permit	
Learning activities	6. Administrative revisions of a permit
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, an admin or assessing user can commence an administrative revision to an issued permit.</li> <li>- This process can be used in the circumstance where a permit has been issued with an error/omission, approved instead or refused or visa-versa.</li> <li>- The user will select the planning application form from the sub-project summary screen. Once on the 'Draft' status, the user will be prompted to select the related permit that this revision relates to.</li> <li>- The user can then progress the application through Draft and 'Submitted' statuses. The application will be moved to the 'Assessment' status, where any changes can be made by an assessor user.</li> <li>- An assessor can then make required changes on the assessment screen and either issue or refuse the permit.</li> <li>- Upon completion, the applicant and owner will receive notification of a permit being issued.</li> <li>- The status of the relevant, previously-completed, permit will be changed to 'superseded'.</li> </ul>
Questions that may arise	<p><b>Q: Who will be notified when I mark as complete?</b></p> <p>A: The same parties who were notified of the original permit/refusal will be notified of a revision.</p> <p><b>Q: Will the revised permit have the same reference number?</b></p> <p>A: No. The Permit will be issued with a new reference number. If using the 'external reference' override, council can use the same reference number as the original Permit 'external reference'.</p>

## Record Appeal Outcome

Record Notice of Appeal	
Learning activities	7. Record appeal outcome and generate Permit
Trainer Notes and points to cover	<p><b>Record Notice of Appeal</b></p> <ul style="list-style-type: none"> <li>- This form can be created by a council user from the Sub Project page.</li> <li>- Use this form to record notice of appeal. This form will also allow you to capture the date that the documents were provided to TasCAT. On completion of this form the Planning Permit status will be updated to be 'Appeal Recorded'.</li> <li>- When the appeal outcome is advised, you can record the outcome using the 'Record Appeal Outcome and Amend Permit' or the 'Record Appeal Outcome and Cancel Permit' form, depending on the decision made by TasCAT.</li> </ul> <p><b>Record Outcome of Appeal</b></p> <ul style="list-style-type: none"> <li>- This form can be created by a council user from the Sub Project page.</li> <li>- There are two different forms with either 'record and cancel permit' or 'record and amend permit'.</li> <li>- Select the correct option and complete the form details.</li> <li>- If cancelled, a cancellation will be sent to the applicant and the previous 'completed' page will be updated to 'Cancelled'.</li> <li>- If amended, a new amended permit will be issued on complete and the previous 'completed' page will be updated to be 'superseded'.</li> </ul>

## Assess Planning Condition Endorsement

Planning Condition Endorsements	
Learning activities	8. Assess a Planning Condition Endorsement
Trainer Notes and points to cover	<p><b>Lodgement (Applicant)</b></p> <ul style="list-style-type: none"> <li>- Applicants will be able to create the 'Application for Condition Endorsement' form from the Sub Project summary page.</li> <li>- They have a table on the application form which they can list the condition number or name, relevant documents or information, document reference.</li> </ul> <p><b>Administration</b></p> <ul style="list-style-type: none"> <li>- The condition endorsement application will follow a similar workflow in PlanBuild as an Application for Planning Permit.</li> <li>- Admin Officers will receive a task to review the application and start the assessment (note: unlike the planning permit application the assessing officer will not have a second 'Submitted' status to review the application).</li> <li>- The admin officer has the ability to reject the application at the 'Submitted' status. Whereas the assessing office can refuse the application at the 'Assessment' status.</li> </ul> <p><b>Assessment</b></p> <ul style="list-style-type: none"> <li>- In the Condition Endorsement Table, the applicant will have left the last column blank for the assessor to enter assessment details against each condition being endorsed.</li> <li>- There is an additional assessment details section which will not appear on the output or be visible to the applicant for additional assessment details.</li> <li>- Assessing Officers have the option to 'Approve and Issue' or 'Refuse' the application, similar to an application for planning permit.</li> <li>- Use the 'Preview Output' to preview the output and ensure the table is formatted as required.</li> </ul>
Questions that may arise	<p><b>Q: How do I add additional conditions/details to the table?</b></p> <p>A: You can right-click on your mouse to add addition columns/rows to the table and formatting in the top ribbon menu of the editor section.</p>

## Issue a Planning Permit for a Subdivision

Subdivision	
Learning activities	9. Issue a Planning Permit for a Subdivision (optional)
Trainer Notes and points to cover	<p><b>Assessment and issue</b></p> <ul style="list-style-type: none"> <li>- Assessment and Determination is all as per Planning Permit Assessment with the exception of an internal referral to Surveying Services.</li> </ul> <p><b>Referral to Surveying Services</b></p> <ul style="list-style-type: none"> <li>- Internal Referrals can be triggered by using the 'Generate Request, Referral or Invoice' section and selecting the relevant party</li> <li>- The Planning Assessing Officer can set the referral timeframe in line with statutory time to raise an RFI to the applicant or internal KPIs.</li> <li>- If the referred to party requires further information/documents they can perform a Request for Information and nominate the items/request from a library.</li> <li>- An RFI from a referred to party will return to the Assessing Officer of the parent assessment claimed who acts as the 'project manager' for the application.</li> <li>- A consolidated RFI can be created to go to the Owner/Applicant where the assessing officer can add all RFI items from internal referrals from a library into a single request.</li> <li>- Once a response is received the Assessing Officer will receive a task to acknowledge the response and resume the clock if required. The Assessing Officer can then provide the response to the relevant internal party, where if the information is insufficient the same process can be repeated.</li> <li>- The referred to party can nominate conditions which must be included on the Planning Permit for Subdivision, these will be able to be selected by an Assessing Officer on the parent application in the 'Conditions' section by selecting '+Add referral condition'.</li> <li>- Assessing Officers will receive a task to confirm the completion of the referral and will be able to see the details/conditions supplied by the referred to party.</li> </ul>
Questions that may arise	<p><b>Q: I need more process help?</b></p> <p>A: Review the Application for Planning Permit processes in this document as they follow the same workflow.</p>



**PlanBuild**  
TASMANIA

## Building Application Administration Training Package



## Building Application Administration Training Course

Course Title – Building Application Administration Training Course	
Time	4 Hours (Half day)
Audience	Building Admin Officer
Requirements/resources	<ul style="list-style-type: none"> <li>- Building Permit Application in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> </ul> </li> </ul> </li> <li>- Building Application for Notifiable Work in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> </ul> </li> </ul> </li> <li>- Building Application for Notification of Low Risk Building Work in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> </ul> </li> </ul> </li> <li>- Building Application Withdrawal Request in the Submitted Status</li> <li>- Application for Permit of Substantial Compliance in the Submitted Status               <ul style="list-style-type: none"> <li>o This submission can include the following documentation:                   <ul style="list-style-type: none"> <li>▪ Example Certificate of Title</li> <li>▪ Example Building Order</li> </ul> </li> </ul> </li> <li>- Application for Building Certificate in the Submitted Status</li> <li>- Post Permit Authorisation Certificate and Permit from a Building Surveyor in the Submission Status</li> </ul>

## Course Title – Building Application Administration Training Course

Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<p>Overview of available applications for building context</p> <ol style="list-style-type: none"> <li>1. Administer a Building Application that is for a Building Permit             <ul style="list-style-type: none"> <li>1.2 requires a RFI</li> </ul> </li> <li>2. Administer a Building Application that is for Notifiable Work &amp; payment required (Lodge Form)</li> <li>3. Receive post Permit Authorisation Certificates &amp; Permits from the Building Surveyor</li> <li>4. Issue a Certificate of Completion</li> <li>5. Administer Notification of Low Risk Work (Building) and payment is required</li> <li>6. Receive and approve withdrawal request (Optional)</li> <li>7. Administrative Revision of a Building Permit</li> <li>8. Application for Permit Substantial Compliance (Optional)</li> <li>9. Application for Building Certificate (Optional)</li> </ol>
Learning Outcomes	<p>At the end of the session review this list and confirm participants know how to:</p> <ul style="list-style-type: none"> <li>- Receive a building application</li> <li>- Review a submitted building application</li> <li>- View, download &amp; edit documents</li> <li>- Request further information &amp; internal/external referrals</li> <li>- Find &amp; acknowledge a referral response</li> <li>- Request &amp; accept a payment</li> <li>- Check building application is complete &amp; generate task to assessing officer for validation</li> <li>- Receive &amp; complete tasks</li> <li>- Find &amp; view a completed building permit</li> <li>- Receive start work notifications</li> </ul>

**Course Title – Building Application Administration Training Course**

	<ul style="list-style-type: none"><li>- Amend a building permit</li><li>- Issue a completion / occupancy certificate</li><li>- Receive a notification of low risk building work</li></ul>
Post training exercises (optional)	<ul style="list-style-type: none"><li>- Review an application for Building Certificate</li></ul>

## Administer an Application for Building Permit

Administer an Application for Building Permit	
Learning activities	<p>Overview of available applications for building context</p> <ol style="list-style-type: none"> <li>1. Administer a Building Application that is for a Building Permit               <ol style="list-style-type: none"> <li>1.1 requires a RFI</li> </ol> </li> </ol>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- An Application for Building Permit will be submitted by an applicant and will be initially available to users with an Admin Officer role in the Building Department</li> <li>- Once the application has been reviewed by an administrative user it will be moved to 'Assessment'. The statutory clock starts at this point.</li> <li>- Permit Authorities and other users with the Assessing Officer role will have view-only access to the Permit</li> <li>- It is expected that by the time the application is referred for assessment, the necessary steps have been taken to confirm that the application is valid (application data reflects the description on the CLC, all relevant documents have been provided, etc.) and any required payment has been made.</li> <li>- Admin Officers will be able to view applications once they have referred for assessment but they will not be able to update the application unless they have the user roles to do so (e.g. Assessing Officer).</li> <li>- If determined by the Admin Officer that the value of work or other detail of the application is wrong, this detail can be amended by council and an additional invoice raised.</li> <li>- Admin Officers can use the Payments button on the navigation bar on the left, or the 'Go to payments' button at the top of the form to see any payment details.</li> <li>- CBOS licensee information will be available within the form. This will detail whether the licence is current, the scope and type of licence as well as any licence conditions. This will remove the need to search licence information via the CBOS website.</li> </ul>
Questions that may arise	<p><b>Q: What if the application is incomplete</b></p> <p>A: An admin user can either reject an incomplete application or request additional information of the applicant.</p>

## Administer an Application for Building Permit

Post training exercise	<ul style="list-style-type: none"><li>- Assess application for Permit Substantial Compliance (same workflow as Application for Building Permit)</li></ul>

## Administer a Notifiable Work Building Application

Administer a Notifiable Work Building Application	
Learning activities	<p>2. Administer a building application that is for notifiable work</p> <p>2.1 with payment required</p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, a Building Surveyor or Applicant can lodge a Certificate of Likely Compliance – Notifiable Building Work with the relevant council.</li> <li>- Where a council chooses to charge upfront payment, the user lodging the CLC will be required to pay the relevant fee prior to the CLC being lodged with council.</li> <li>- Upon lodgement, the CLC will become available to the Building Admin Officer user for review.</li> <li>- The Admin Officer has the option to request further information, raise an invoice or refer the CLC to another internal user.</li> <li>- The Admin Officer can either choose to Start Assessment or Reject the submitted CLC.</li> <li>- If rejected, the Admin Officer will be prompted to give a reason for rejection and lodgement form status will be changed to 'Rejected'. The applicant will be notified and can view the reason for rejection on the 'Rejected' status summary page.</li> <li>- If the Admin Officer user chooses to start assessment, the form will be moved to the 'Assessment' status and an Assessing Officer user within the building department can claim the form.</li> <li>- The Assessing Officer has the option to request further information, raise an invoice or refer the CLC to another internal user.</li> <li>- If satisfied, the Assessing Officer can acknowledge the CLC submission. Upon acknowledgment, the lodgement form will be moved to the 'Completed' status and a notification will be sent to the Applicant, Owner and the Building Surveyor.</li> <li>- If the Assessing Officer chooses to refuse the lodgement of the CLC, they enter reasons for refusal on the assessment page and select 'Refuse'. The applicant will be provided with a refusal PDF including the reason for refusal.</li> </ul>
Questions that may arise	<p><b>Q: How does council deal with Certificates that are received outside of PlanBuild?</b></p> <p>A: Council has the ability to create the relevant project and sub project and upload the certificate.</p>

## Receive post Permit Authorisation Certificates & Permits from the Building Surveyor

3. Receive post Permit Authorisation Certificates & Permits from the Building Surveyor	
Learning activities	3. Receive post Permit Authorisation Certificates & Permits from the Building Surveyor
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The purpose of this form is to allow a vehicle for the Building Surveyor (or Applicant on their behalf) to upload documents produced externally of PlanBuild (E.g. Occupancy Permit, Certificate of Final Inspection etc.)</li> <li>- Admin Officers will receive the lodged form to check for completeness and progress to assess for noting.</li> <li>- The Assessing Officer can close off the task and any document provided will be available across the Sub Project.</li> </ul>
Questions that may arise	<p><b>Q: What if the certificates are received outside of PlanBuild (e.g. via email)?</b></p> <p>A: The business can choose to require that these documents be lodged via PlanBuild, alternatively this form can be created by a council user on their behalf.</p>

## Issue a Certificate of Completion

5. Issue a Certificate of Completion	
Learning activities	5. Issue a Certificate of Completion
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Upon receiving all required documents relating to the completion of Permit Building Work, the council user can select the '<i>Certificate of Completion – Permit Building Work (Form 20)</i>' on the <i>Sub Project</i> page.</li> <li>- There are options to request additional information, refer internally or raise an invoice.</li> <li>- The system will allow for a council user with either the 'Admin Officer' or 'Assessing Officer' role to complete this form.</li> <li>- The council user can use the 'Preview Output' (Certificate or Refusal) to see what will be issued.</li> <li>- An expiry notification will be sent to the applicant when the expiry date of the certificate is 42 and 14 days away.</li> </ul>
Questions that may arise	<p><b>Q: Who receives notifications upon issuing a determination?</b></p> <p>A: All licensees associated with the Project, Project Administrator, Applicant and Owner will be notified.</p>



## Administer a Notification of Low Risk Building Work form

Administer a Notification of Low Risk Building Work form	
Learning activities	<p>1. Administer Notification of Low Risk Work (Building)</p> <p>1.1 payment is required</p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Unlike other application forms, this form has a simple workflow allowing it to be paid, submitted and completed. Whilst there is an 'Assessment' status, this is for the purpose of confirming the payment is complete and the category of work is Low Risk.</li> <li>- The BAF and ITL will automatically be applied to upfront payments and invoices on all applications where the value of work is over \$20,000.</li> <li>- Admin Officers can use the 'Go to payments' button at the top of the form or search on LHS navigation pane to see any payment details.</li> <li>- If additional payments are required, council users can raise a request for payment using PlanBuild.</li> </ul>
Questions that may arise	<p><b>Q: What if this is received outside of PlanBuild (E.g. via email or over counter)?</b></p> <p>A: The business can choose to require that these documents be lodged via PlanBuild, alternatively this form can be created by a council user on their behalf.</p>

## Withdrawal Requests

Receive request to withdraw an application	
Learning activities	<p>7. Receive and approve a request to withdraw an application</p> <p>7.1 with a refund request</p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild an applicant can use a form titled 'Withdrawal Request' to withdraw an application that has been submitted to council and is in the 'Submitted' or 'Assessment' status.</li> <li>- An applicant must provide a reason for referral with their request.</li> <li>- The applicant must select from a list of council users to receive the request. The user who has claimed the parent application would be listed as 'assignee'.</li> <li>- Upon submission, the selected council user will have a task to review the Withdrawal Request. The council user can make comments on this form and either 'Confirm' or 'Reject' the withdrawal.</li> <li>- If confirmed, the withdraw request will be completed and associated with the relevant permit. The status of the relevant certificate/permit application will be changed to 'Withdrawn', the reason for referral will be displayed on the 'Withdrawn' status.</li> </ul>
Questions that may arise	<p><b>Q: What if an applicant requests to withdraw their application outside of PlanBuild (email/phone call etc.).</b></p> <p>A: The council user can either direct the user to use PlanBuild or submit the Withdrawal Request on the Applicant's behalf.</p>

## Administrative Revision of a Building Permit

Administrative Revision of a Building Permit	
Learning activities	6. Administrative revisions of a permit
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, an admin or assessing user can commence an administrative revision to an issued building permit.</li> <li>- This process can be used in the circumstance where a permit has been issued with an error/omission, approved instead or refused or visa-versa.</li> <li>- The user will select the Application for Building Permit (Form 2) from the sub-project summary screen. Once on the 'Draft' status, the user will be prompted to select the related permit that this revision relates to.</li> <li>- The user can then progress the application through Draft and 'Submitted' statuses. The application will be moved to the 'Assessment' status, where any changes can be made by an assessor user.</li> <li>- An assessor can then make required changes on the assessment screen and either issue or refuse the permit.</li> <li>- Upon completion, the Applicant and Owner will receive notification of a permit being issued.</li> <li>- The status of the relevant, previously-completed, permit will be changed to 'superseded'.</li> </ul>
Questions that may arise	<p><b>Q: Who will be notified when I mark as complete?</b></p> <p>A: The Owner, Project Administrator and Applicant will be notified. Any party with access to the project/sub project will be able to view the completed screen.</p> <p><b>Q: Will the revised permit have the same reference number?</b></p> <p>A: No. The Permit will be issued with a new reference number. If using the 'external reference' override, council can use the same reference number as the original Permit 'external reference'.</p>

## Issue a Building Permit Refusal

Issue a Building Permit Refusal	
Learning activities	7. Issue a Building Permit Refusal with reasons (Optional)
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- This follows the same process as approving a Building Permit, however the Assessing Officer must select 'Refuse'.</li> <li>- The reasons for refusal must be completed (these will appear on the output).</li> <li>- The 'Preview Output' function can be used for the Assessing Officer to see what the Notice of Refusal will look like for the applicant.</li> </ul>
Questions that may arise	<p><b>Q: What if a Permit is refused in error?</b></p> <p>A: The administrative amendment form can be used in this instance to issue a new approval.</p> <p><b>Q: Who will be notified once refusal is issued?</b></p> <p>A: The Building Surveyor, Applicant and Owner will be notified (and any referral authority if involved in the assessment process (e.g. TFS).</p>



**PlanBuild**  
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## Building Application Assessment Training Package

## Building Application Assessment Training Course

Course Title – Building Application Assessment Training Course	
Time	8 Hours (1 Day)
Audience	<ul style="list-style-type: none"> <li>- Building Permit Authority</li> <li>- Compliance Officer</li> </ul>
Requirements/resources	<ul style="list-style-type: none"> <li>- Building Permit Application in the Assessment Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> </ul> </li> </ul> </li> <li>- Building Permit Application in the Assessment Status (that is to be refused)               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> </ul> </li> </ul> </li> <li>- Application to Amend Building Permit in the Assessment Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> </ul> </li> </ul> </li> <li>- Post Permit Certificates &amp; Permits Submitted by the Building Surveyor</li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<p>Overview of available applications for building context</p> <ol style="list-style-type: none"> <li>1. Assess Application for Building Permit               <ol style="list-style-type: none"> <li>1.2 that requires an RFI</li> <li>1.3 that requires an internal referral</li> </ol> </li> </ol>

**Course Title – Building Application Assessment Training Course**

	<p>2. Issue a Building Permit approval with council conditions &amp; documentation</p> <p>3. Issue a Building Permit Refusal with reasons (Optional)</p> <p>4. Administrative Revision of a Building Permit</p> <p>5. Assess an application for amended Building Permit</p> <p>6. Receive post Permit Authorisation Certificates &amp; Permits from the Building Surveyor</p> <p>7. Issue a Certificate of Completion</p>
<p>Learning Outcomes</p>	<p>How to:</p> <ul style="list-style-type: none"> <li>- Receive a submitted Building Application</li> <li>- Review the Building Application</li> <li>- View, download &amp; edit documents</li> <li>- Request further information &amp; internal/external referrals</li> <li>- Request &amp; accept an additional payment</li> <li>- Manage clocks</li> <li>- Complete a Building Application assessment in PlanBuild</li> <li>- Review licence service providers</li> <li>- Review CLC, CRD, CQP</li> <li>- Stamp &amp; sign documents</li> <li>- Add conditions</li> <li>- Request an extension of time</li> <li>- Approve &amp; issue a Building Permit</li> <li>- Reject or refuse an Application</li> <li>- Find &amp; view a completed Building Permit</li> <li>- Receive Start Work Notifications</li> <li>- Request a Building Inspections</li> <li>- Issue building orders / notices, incl. demolition</li> <li>- Amend a Building Permit</li> <li>- Issue a completion / occupancy certificate</li> </ul>

## Assess Application for Building Permit

Assess Application for Building Permit	
Learning activities	<p>1. Assess a building application that is for a building permit</p> <p>1.1 that requires a RFI</p>
Trainer Notes and points to cover	<p><b>Receive an Application for Assessment</b></p> <ul style="list-style-type: none"> <li>- Building applications will be submitted by applicants and will be initially assigned to users with an Admin Officer role.</li> <li>- Once an application has been reviewed by admin and moved to 'Assessment', Permit Authorities and other users with the Assessing Officer role will be able to claim the assessment task.</li> <li>- It is expected that by the time the application is referred for assessment the necessary steps have been taken to confirm that the application is valid and any required payment made.</li> <li>- Council users without the 'Assessing Officer' role will be able to view applications under assessment. However, only a user with the 'Assessing Officer' role will be able to claim and action the task.</li> </ul> <p><b>Assessment</b></p> <ul style="list-style-type: none"> <li>- At this status the Assessing Officer can: <ul style="list-style-type: none"> <li>o perform referrals (internal and external);</li> <li>o request further information or payment;</li> <li>o view application details;</li> <li>o record details of the assessment;</li> <li>o view, edit and stamp document;</li> <li>o apply condition from the library;</li> <li>o preview the output (permit or refusal); and</li> <li>o approve/refuse and issue outputs (can assign the assessment task to senior planner/other users to issue)</li> </ul> </li> <li>- 'Preview Output' can be used to see what the output (permit or refusal) will look like. To preview a permit select 'Approve and Issue' and then on the review and confirm screen, select 'Preview Output'. If changes are required you can cancel out and make changes to the assessment screen.</li> </ul>



## Assess Application for Building Permit

	<p><b>Request for Information</b></p> <ul style="list-style-type: none"><li>- You can request additional information in the 'Referral/Requests' section.</li><li>- You can select from anyone associated with the application (i.e. the applicant) who will receive a task to respond with the requested information/documents.</li><li>- Council are able to select RFI reasons from a library specific for your organisation, or free type a custom request.</li><li>- Once the selected user responds, the user who issued the request will receive a notification/task to review and accept the response.</li></ul>
Questions that may arise	<p><b>Q: If an Admin Officer starts an RFI, will that stop me from progressing the application to the Assessing Officer?</b></p> <p>A: No, Admin Officer can start an RFI and progress the application to the next stage, the Assessing Officer will be able to see if there are any outstanding RFIs.</p>

## Issue Building Permit Approval with Council Conditions & Documentation

Issue Building Permit approval with council conditions and documentation	
Learning activities	2. Issue a Building Permit approval with council conditions & documentation
Trainer Notes and points to cover	<p><b>Conditions</b></p> <ul style="list-style-type: none"> <li>- While under Assessment, an assessor user can add conditions to a permit as well as select the documentation that will be endorsed with the permit.</li> <li>- Conditions can be added from the organisations conditions library. Once added to the Assessment conditions section, these conditions can be edited for the specific output.</li> <li>- Edits made to a library condition on an assessment screen will not be saved to the condition library.</li> <li>- An Assessing Officer can also add a new, non-library, condition to the conditions section on an assessment screen. They will be prompted to enter text. Conditions added this way will not be saved to the library.</li> <li>- Users with the Organisation System Admin role are able to add and edit library conditions.</li> <li>- Conditions can be arranged within the condition section on the assessment screen. Conditions will be displayed in the order that they</li> </ul> <p><b>Documentation</b></p> <ul style="list-style-type: none"> <li>- Documents in the Assessment Documents section of the assessment screen will be endorsed as part the output. Documents in the Available Documents section will not form part of the output.</li> <li>- The assessor can choose to apply a stamp to documents within the Assessment Documents section. This stamp will appear on the documents upon completion of the Permit. The stamp cannot be placed manually or previewed prior to completion.</li> <li>- Should the council need to add a stamp or mark up outside of PlanBuild, the assessor user can download the plans, make any edits and reupload as a new revision.</li> </ul>

## Issue Building Permit approval with council conditions and documentation

- The PlanBuild stamp will attempt to find white-space within a page to place the stamp. If no white space is available, the stamp will be applied where it will cover the least amount of information.

### **Issuing a Permit:**

- Once a permit is issued, PlanBuild will take a few minutes to process the final PDF document output and endorsed documents.
- External notifications are sent out at the time that the PDF output becomes available.
- An expiry notification will be sent to the applicant when the expiry date of the permit is 42 and 14 days away.

## Issue Building Permit Refusal with Reasons

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Issue Building Permit refusal with reasons	
Learning activities	3. Issue a Building Permit Refusal with reasons (Optional)
Trainer Notes and points to cover	<p><b>Issuing a Building Permit Refusal:</b></p> <ul style="list-style-type: none"><li>- This follows the same process as approving a Building Permit, however the Assessing Officer must select 'Refuse'.</li><li>- The reasons for refusal must be completed (these will appear on the output).</li></ul> <p>The 'Preview Output' function can be used for the Assessing Officer to see what the Notice of Refusal will look like for the applicant.</p>

## Administrative Revision of a Building Permit

Administrative Revision of a Building Permit	
Learning activities	4. Administrative Revision of a Building Permit
Trainer Notes and points to cover	<p><b>Administrative revisions:</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, an admin or assessing user can commence an administrative revision to an issued building permit.</li> <li>- This process can be used in the circumstance where a permit has been issued with an error/omission, approved instead or refused or visa-versa.</li> <li>- The user will select the Application for Building Permit (Form 2) from the sub-project summary screen. Once on the 'Draft' status, the user will be prompted to select the related permit that this revision relates to.</li> <li>- The user can then progress the application through Draft and 'Submitted' statuses. The Application will be moved to the 'Assessment' status, where any changes can be made by an assessor user.</li> <li>- An assessor can then make required changes on the assessment screen and either issue or refuse the permit.</li> <li>- Upon completion, the applicant and owner will receive notification of a permit being issued.</li> <li>- The status of the relevant, previously-completed, permit will be changed to 'superseded'.</li> </ul> <p><b>Administrative revisions:</b></p> <ul style="list-style-type: none"> <li>- Ensure you select the 'Application for Building Permit (Form 2)' to perform a revision of a previously complete permit. There is a form available for council with internal building surveyors call 'Building Permit (Form 18)', if you select this form the administrative revision functionality will not work and you will issue a new permit without superseding the previous.</li> </ul>
Questions that may arise	<p><b>Q: Who will be notified when I mark as complete?</b></p> <p>A: The Owner, Project Administrator and Applicant will be notified. Any party with access to the project/sub project will be able to view the completed screen.</p> <p><b>Q: Will the revised permit have the same reference number?</b></p>

	A: No. The Permit will be issued with a new reference number. If using the 'external reference' override, council can use the same reference number as the original Permit 'external reference'.

## Assess an Application for Amended Building Permit

Assess an application for amended Building Permit	
Learning activities	5. Assess an application for amended Building Permit
Trainer Notes and points to cover	<ul style="list-style-type: none"><li>- In PlanBuild, an applicant can apply for an amendment to an issued permit or certificate.</li><li>- The application and assessment process for an amendment follows the same process as the initial permit or certificate.</li><li>- With the application, the applicant will be prompted to provide details of the amendment.</li><li>- The application for amendment will be available to council users as per the initial application form.</li><li>- Assessment functionality is the same as the initial certificate/permit assessment screen, with the addition of a reason for amendment.</li><li>- Assessment fields will be prefilled with information from the initial approval where possible.</li><li>- Upon approval of an amended Permit, the relevant, previously issued, permit's status will be changed to 'Superseded',</li></ul>

## Receive post Permit Authorisation Certificates & Permits from the Building Surveyor

6. Receive post Permit Authorisation Certificates & Permits from the Building Surveyor	
Learning activities	6. Receive post Permit Authorisation Certificates & Permits from the Building Surveyor
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The purpose of this form is to allow a vehicle for the Building Surveyor (or Applicant on their behalf) to upload documents produced externally of PlanBuild (E.g. Occupancy Permit, Certificate of Final Inspection etc.)</li> <li>- Admin Officers will receive the lodged form to check for completeness and progress to assess for noting.</li> <li>- The Assessing Officer can close off the task and any document provided will be available across the Sub Project.</li> </ul>
Questions that may arise	<p><b>Q: What if the certificates are received outside of PlanBuild (e.g. via email)?</b></p> <p>A: The business can choose to require that these documents be lodged via PlanBuild, alternatively this form can be created by a council user on their behalf.</p>



## Issue a Certificate of Completion

7. Issue a Certificate of Completion	
Learning activities	7. Issue a Certificate of Completion
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Upon receiving all required documents relating to the completion of Permit Building Work, the council user can select the '<i>Certificate of Completion – Permit Building Work (Form 20)</i>' on the <i>Sub Project</i> page.</li> <li>- There are options to request additional information, refer internally or raise an invoice.</li> <li>- The system will allow for a council user with either the 'Admin Officer' or 'Assessing Officer' role to complete this form.</li> <li>- The council user can use the 'Preview Output' (Certificate or Refusal) to see what will be issued.</li> <li>- An expiry notification will be sent to the applicant when the expiry date of the certificate is 42 and 14 days away.</li> </ul>
Questions that may arise	<p><b>Q: Who receives notifications upon issuing a determination?</b></p> <p>A: All licensees associated with the Project, Project Administrator, Applicant and Owner will be notified.</p>



**PlanBuild**  
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Environmental Health Officer –  
(Building)  
Training Package

## Environmental Health Officer (Building) Training Course

Course Title – Environmental Health Officer (Building) Training Course	
Time	1 hour
Audience	<ul style="list-style-type: none"> <li>- Internal Environment Health Officer</li> </ul>
Requirements/resources	<ul style="list-style-type: none"> <li>- Occupancy Certificate application in assessment status with Building Surveyor (this will allow the button to 'Request for Environmental Health Officer Report (Form 42)')</li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. Assess Environmental Health Officer Report               <ol style="list-style-type: none"> <li>a. Generate RFI request</li> </ol> </li> <li>2. Issue Environmental Health Officer Occupancy Report</li> </ol>
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> <li>- Assess a request for EHO Report</li> <li>- Request information</li> <li>- Issue a EHO Report</li> <li>- Assess a request for EHO Occupancy Report</li> <li>- Issue a EHO Occupancy Report</li> </ul>

## Assess and Issue Environmental Health Officer Report

Assess an Environmental Health Officer Report Request	
Learning activities	<ol style="list-style-type: none"> <li>1. Assess Environmental Health Officer Report Request               <ol style="list-style-type: none"> <li>1.1 Generate RFI request</li> <li>1.2 Generate EHO Report</li> </ol> </li> </ol>
Trainer Notes and points to cover	<p><b>Receiving the request (referral)</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, a Building Surveyor using the system to assess/produce an Occupancy Permit can refer an application. This will create a Request Report from Environmental Health Officer (Form 42).</li> <li>- The Building Surveyor can add in request details and any documents they wish to provide as part of the request.</li> <li>- This will create a task for the relevant council EHO(s) to 'Assess Environmental Health Officer Report (Form 49)' which can be claimed by any organisation user with the departments 'Permit Authority' and 'Permit Authority – Environmental Health' and the 'Assessing Officer' role in PlanBuild.</li> </ul> <p><b>Receiving the request (non-referral)</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, there is a form called 'Request for Environmental Health Officer Report (Form 42)' available on a Building Sub Project.</li> <li>- This form is used by a Building Surveyor to request an Environmental Health Officer Occupancy Report from the council. Only Building Surveyors that are <b>not</b> using PlanBuild Tasmania to produce their Certificate of Likely Compliance will use this form.</li> <li>- The standalone form follows the same process as the referral triggered from the CLC creation in PlanBuild. This form contains the same content as the CLC-referral form and will be processed by Council in the same way.</li> <li>- Council EHOs will receive a task to Complete Environmental Health Officer Report.</li> </ul> <p><b>Assess Environmental Health Officer Report Request</b></p> <ul style="list-style-type: none"> <li>- Unlike other application types there is no 'Submitted status' (as it is a referral) so it will be automatically in the 'Assessment' status.</li> <li>- If further information is required this can be requested from the owner/applicant or the Building Surveyor (see below).</li> <li>- Conditions can be applied as part of the report which must be included on the CLC. Any conditions added to the report will be able</li> </ul>

## Assess an Environmental Health Officer Report Request

to be selected by the Building Surveyor to add to the CLC by selecting '+Add Referral Condition'.

- Conditions can be added from a library and edited for the particular report (this will not change the condition in the library).
- Library conditions can be added/edited by anyone in the organisation with the 'Organisation System Admin' role in PlanBuild.

### **Raise an RFI**

- If further information is required, the assessor can request further information using the 'Request Information from applicant or owner' button.
- The user can select anyone associated with the Project from the drop down.
- The user can nominate 'RFI Reasons' from a library or add a custom request/reason and nominate any documents to be provided.
- Once a response is received, you will receive a task to review and confirm the response is sufficient.
- If the information is insufficient a new 'Request for Information' can be raised and the same process followed, until sufficient information is provided.

### **Generate EHO Report**

- The assessor can either produce the report nominating or issue a notice of refusal.
- If refused the 'Reason for Refusal' field will be displayed on the output.
- The user can preview either output by selecting the 'Preview Output' checkbox on the 'Review & Confirm' screen.

# Assess and Issue Environmental Health Officer Occupancy Report

Assess an Environmental Health Officer Occupancy Report	
Learning activities	2. Assess and Issue Environmental Health Officer Occupancy Report
Trainer Notes and points to cover	<p><b>Receiving the request (referral)</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, a Building Surveyor using the system to assess/produce an Occupancy Permit can refer an application. This will create a Request Report from Environmental Health Officer (Form 42).</li> <li>- The Building Surveyor can add in request details and any documents they wish to provide as part of the request.</li> <li>- This will create a task for the relevant council EHO(s) to 'Assess Environmental Health Officer Occupancy Report (Form 49)' which can be claimed by any organisation user with the departments 'Permit Authority' and 'Permit Authority – Environmental Health' and the 'Assessing Officer' role in PlanBuild.</li> </ul> <p><b>Receiving the request (non-referral)</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, there is a form called 'Request for Environmental Health Officer Report (Form 42)' available on a Building Sub Project.</li> <li>- This form is used by a Building Surveyor to request an Environmental Health Officer Occupancy Report from the council. Only Building Surveyors that are <b>not</b> using PlanBuild Tasmania to produce their Certificate of Likely Compliance will use this form.</li> <li>- The standalone form follows the same process as the referral triggered from the Occupancy Permit in PlanBuild. This form contains the same content as the Occupancy Permit referral form and will be processed by Council in the same way.</li> <li>- Council EHOs will receive a task to Complete Environmental Health Officer Occupancy Report.</li> </ul> <p><b>Assess the request</b></p> <ul style="list-style-type: none"> <li>- Unlike other application types there is no 'Submitted status' (as it is a referral) so it will be automatically in the 'Assessment' status.</li> <li>- If further information is required this can be requested from the owner/applicant or the Building Surveyor (see below).</li> <li>- Conditions can be added from a library and edited for the particular report (this will not change the condition in the library).</li> </ul>

## Assess an Environmental Health Officer Occupancy Report

- Library conditions can be added/edited by anyone in the organisation with the 'Organisation System Admin' role in PlanBuild

### **Generate the report**

- The assessor can either produce the report nominating or issue a notice of refusal.
- If refused the 'Reason for Refusal' field will be displayed on the output.
- The user can preview either output by selecting the 'Preview Output' checkbox on the 'Review & Confirm' screen.



**PlanBuild**  
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Internal Referral Authority  
Training Package



## Internal Referral Authority Training Course

Course Title – Internal Referral Authorities Training Course	
Time	2 hours
Audience	Internal Referral Authorities
Requirements/resources	<ul style="list-style-type: none"> <li>- Overview of available applications for planning context – ppt presentation</li> <li>- Planning Application in the Assessment Status               <ul style="list-style-type: none"> <li>o This application is to have the following supporting documentation:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> </ul> </li> </ul> </li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. Assess a Discretionary application that needs an internal referral           <ol style="list-style-type: none"> <li>1.1 Generate an RFI request</li> </ol> </li> <li>2. Generate a Referral Report (DE, Heritage etc)           <ol style="list-style-type: none"> <li>2.1 Refer to planner referral conditions</li> </ol> </li> </ol>
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> <li>- Receive a referral</li> <li>- Request information</li> <li>- Add conditions</li> <li>- Issue a Referral Report</li> </ul>

## Internal Referral Authority – Assess Application

Assess an application and raise RFI	
Learning activities	<ol style="list-style-type: none"> <li>1. Receive a referral of a planning application               <ol style="list-style-type: none"> <li>1.1 View parent application and documents</li> <li>1.1 Generate an RFI request</li> <li>1.2 Receive RFI response</li> </ol> </li> </ol>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, an Admin Officer or Assessing Officer can refer an application to another user within the organisation. This is available to the Admin Officer at the 'Submitted' status and the Assessing Officer on the 'Assessment' status.</li> <li>- An internal referral for a planning application is designed to create a report-type output that could be provided to a council/committee meeting.</li> <li>- The user creating the referral will choose the user that will receive the task to respond to the referral.</li> <li>- All referrals (current and complete) can be tracked via the Planning Assessment page, or via the Sub Project page.</li> <li>- The referred to party can navigate back to the parent application to view details of the application to help form part of their assessment (if required).</li> <li>- The referred to party that is responding to a referral can create a request for further information to be considered by the Assessing Officer.</li> <li>- If further information is required from the Applicant (or other party) the Assessing Officer can trigger an RFI from the parent application and select from the reasons provided from the internal referral.</li> </ul>
Questions that may arise	<p><b>Q: Can I communicate directly with the Applicant?</b></p> <p>A: Not using PlanBuild, if further information is required for your referral to be completed you can request further information using the referral assessment page. The Assessing Officer of the parent application will pass this on to the relevant party for response.</p>

## Internal Referral Authority – Generate Report

Generate Assessment Report	
Learning activities	<p>2. Generate an Assessment Report (DE, Heritage etc.)</p> <p>2.1 Refer to planner with referral conditions</p>
Trainer Notes and points to cover	<p><b>Receive the referral task</b></p> <ul style="list-style-type: none"> <li>- A new task will be created to 'Review Referral' once an Assessing Officer has created an Internal Referral.</li> <li>- If an individual is selected when creating the referral they will receive the task and email notification. Dummy users can be created for an organisation if these are required to go to a generic email inbox.</li> </ul> <p><b>Generate report</b></p> <ul style="list-style-type: none"> <li>- The referred to party will have an assessment screen where they can use the individual section to complete the referral report.</li> <li>- If further information is required, you can request further information using the 'Request Further Information' button, see below for details.</li> <li>- You can nominate conditions to be included on the Permit/Refusal using the 'Conditions' section. These can be selected from a library in your organisation or a custom condition can be free typed.</li> <li>- The Assessing Office of the parent application will be able to select any conditions you nominate from the '+Add Referral Condition' button. A task will be generate for the Assessing Officer to review your response to the referral so they know there are conditions to be added from your referral.</li> </ul> <p><b>Generate requests for information</b></p> <ul style="list-style-type: none"> <li>- If further information is required, you can request further information using the 'Request Further Information' button. This will create a task for the assessing officer for the parent application to either provide you additional information to complete the report, or make a request to the applicant (or other) using the information provided in your request.</li> <li>- You can nominate 'RFI Reasons' from a library or add a custom request/reason. When the assessing officer goes to create an RFI to the applicant (or other) they will be able to select your nominate reason/request from the '+Add Reason from a Related Form' button.</li> <li>- Once a response is received, the assessing officer can respond with the additional information for you to complete your assessment</li> </ul>

## Generate Assessment Report

	<p>(you can continue to work on the assessment whilst this is outstanding if required).</p> <ul style="list-style-type: none"><li>- If the information is insufficient a new 'Request for Information' can be raised and the same process followed, until sufficient information is provided.</li></ul>
Questions that may arise	<p><b>Q: How will the person who referred the application to me know if I have nominated conditions to be included?</b></p> <p>A: A task will be generate for the Assessing Officer to review your response to the referral so they know there are conditions to be added from your referral.</p> <p><b>Q: How is the 'due date' set for a referral?</b></p> <p>A: The assessing officer for the parent application will set the timeframe for the referral manually as part of creating the referral. This may align to statutory timeframes to perform an RFI to the applicant or to meet internal KPIs.</p>



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# Plumbing Application Administration Training Package

# Plumbing Application Administration Training Course

Course Title – Plumbing Application Administration Training Course	
Time	
Audience	Plumbing Admin Officers
Requirements/resources	<ul style="list-style-type: none"> <li>- Application for CLC Plumbing Work (Permit Work) in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to have supporting documentation, such as:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> <li>▪ Certificates of the responsible designers – plumbing work</li> </ul> </li> <li>o This application can be used for activity #2</li> <li>o This application can be used for activity #3</li> <li>o This application can be used for activity #6</li> </ul> </li> <li>- Application for CLC Plumbing Work (Notifiable Work) in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to have supporting documentation, such as:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> <li>▪ Example Certificate of Title</li> <li>▪ Certificates of the responsible designers – plumbing work</li> </ul> </li> </ul> </li> <li>- Request to withdraw application in the Submitted Status</li> <li>- Application for Notification of Low Risk - Plumbing Work in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to have supporting documentation, such as:                   <ul style="list-style-type: none"> <li>▪ Example Plans</li> </ul> </li> </ul> </li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	1. Administer a plumbing application that is for CLC-Plumbing (Permit Work)

**Course Title – Plumbing Application Administration Training Course**

	<p>1.1 with payment required</p> <p>2. <i>Overview of assessment process to progress applications (Assessing Officer Role)</i></p> <p>3. Issue Certificate of Completion</p> <p>4. Receive and approve a request to withdraw an application with a refund request</p> <p>5. Administer a Plumbing Application that is for CLC-Plumbing (Notifiable Work) (Optional)</p> <p>6. Amend a Previously Issued Permit – Plumbing</p> <p>7. Administer Notification of Low Risk Work (Plumbing)</p>
<p>Learning Outcomes</p>	<p>At the end of the session review this list and confirm participants know how to:</p> <ul style="list-style-type: none"> <li>- How to:</li> <li>- Receive a Plumbing Application</li> <li>- Review a submitted Plumbing Application</li> <li>- View, download &amp; edit documents</li> <li>- Request further information &amp; internal/external referrals</li> <li>- Find &amp; acknowledge a referral response</li> <li>- Request &amp; accept a payment</li> <li>- Receive &amp; complete tasks</li> <li>- Find &amp; view a completed Plumbing Permit</li> <li>- Amend a Plumbing Permit</li> <li>- Receive a Notification of Low Risk Plumbing Work</li> </ul>

## Administer a plumbing application that is for CLC-Plumbing (Permit Work)

Administer a plumbing application that is for CLC-Plumbing (Permit Work)	
Learning activities	<p>3. Administer a plumbing application that is for CLC-Plumbing (Permit Work)</p> <p>3.1 with payment required</p> <p>4. <i>Overview of assessment process to progress applications (Assessing Officer Role)</i></p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The Plumbing CLC application caters for both Permit Plumbing Work and Notifiable Plumbing work. The output of this application and assessment will be a CLC only. For Permit Plumbing work a council user will create and issue a separate Plumbing Permit.</li> <li>- Plumbing CLC application will be submitted by applicants and will be initially available to users with an Admin Officer role in the Plumbing Department.</li> <li>- Applicants are required to nominate the category of plumbing work on the application form, however, this can be amended by either the Admin Officer on the 'Submitted' status or the Assessing Officer on the 'Assessment' status.</li> <li>- Once the application has been reviewed by an Admin Officer it will be moved to 'Assessment' status. The CLC statutory clock starts at this point.</li> <li>- Permit Authorities and other users with the Assessing Officer role will have view-only access to the CLC.</li> <li>- It is expected that by the time the application is referred for assessment the necessary steps have been taken to confirm that the application is valid and any required payment made.</li> <li>- Admin Officers will be able to view applications once they have referred for assessment but they will not be able to update the application unless they have the 'Assessing Officer' role in PlanBuild.</li> <li>- If determined by the Admin Officer that the category/value of work/classification or other detail of the plumbing application is wrong, this detail can be amended by council and an additional invoice raised.</li> <li>- CBOS licensee information will be available within the form. This will detail whether the licence is current, the scope and type of licence as</li> </ul>



## Administer a plumbing application that is for CLC-Plumbing (Permit Work)

	well as any licence conditions. This will remove the need to search licence information via the CBOS website.
Questions that may arise	<p><b>Q: What if an application for Plumbing CLC is submitted with the incorrect category of work specified.</b></p> <p>A: The admin officer can either reject the application and require resubmission with the correct information OR reclassify the work within the submitted screen. An additional invoice can be raised.</p>

## Issue Certificate of Completion

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Issue a Certificate of Completion	
Learning activities	5. Issue Certificate of Completion
Trainer Notes and points to cover	<ul style="list-style-type: none"><li>- In PlanBuild, an Admin Officer or Assessing Officer can issue a Certificate of Completion.</li><li>- As part of this form, the user has the ability to raise an invoice, request further information or refer internally.</li><li>- Upon issue of a Certificate of Completion, the Plumber(s), Applicant and Owner will receive a notification.</li><li>- An expiry notification will be sent to the applicant when the expiry date of the certificate is 42 and 14 days away.</li></ul>

## Withdrawal Requests

Receive request to withdraw an application	
Learning activities	<p>6. Receive and approval a request to withdraw an application</p> <p>6.1 with a refund request</p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, an applicant can use a form titled 'Withdrawal Request' to withdraw an application that has been submitted to council and is in the 'Submitted' or 'Assessment' status.</li> <li>- An applicant must provide a reason for referral with their request.</li> <li>- The applicant must select from a list of council users to receive the request. The user who has claimed the parent application would be listed as 'assignee'.</li> <li>- Upon submission, the selected council user will have a task to review the withdrawal request. The council user can make comment on this form and either 'Confirm' the withdrawal or 'Reject' the withdrawal.</li> <li>- If confirmed, the withdrawal request will be completed and associated with the relevant permit. The status of the relevant certificate/permit application will be changed to 'Withdrawn', the reason for referral will be displayed on the 'Withdrawn' status.</li> </ul>
Questions that may arise	<p><b>Q: What if an applicant requests to withdraw their application outside of PlanBuild (email/phone call etc).</b></p> <p>A: The council user can either direct the user to use PlanBuild or submit the Withdrawal request on the applicant's behalf.</p>

## Administer a Plumbing CLC Application (Notifiable Work)

Administer a Plumbing Application that is for CLC-Plumbing (Notifiable Work)	
Learning activities	7. Administer a Plumbing Application that is for CLC-Plumbing (Notifiable Work) (Optional)
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The Plumbing CLC application caters for both Permit Plumbing Work and Notifiable Plumbing work. The output of this application and assessment will be a CLC only.</li> <li>- Plumbing CLC application submitted will be initially available to users with an Admin Officer role in the Plumbing Department.</li> <li>- Applicants are required to nominate the category of plumbing work on the application form, however this can be amended by either the Admin Officer on the 'Submitted' status or the Assessing Officer on the 'Assessment' status.</li> <li>- Once the application has been reviewed by an Admin Officer it will be moved to 'Assessment'. The CLC statutory clock starts at this point.</li> <li>- Permit Authorities and other users with the Assessing Officer role will have view-only access to the CLC</li> <li>- It is expected that by the time the application is referred for assessment the necessary steps have been taken to confirm that the application is valid and any required payment has been made.</li> <li>- Admin Officers will be able to view applications once they have referred for assessment, but they will not be able to update the application unless they have the Assessing Officer role in PlanBuild.</li> <li>- If determined by the Admin Officer that the category/value of work/classification or other detail of the plumbing application is wrong, this detail can be amended by council and an additional invoice raised.</li> <li>- CBOS licensee information will be available within the form. This will detail whether the licence is current, the scope and type of licence as well as any licence conditions. This will remove the need to search licence information via the CBOS website.</li> </ul>
Questions that may arise	<b>Q: What if an application for Plumbing CLC is submitted with the incorrect category of work specified.</b>

## Administer a Plumbing Application that is for CLC-Plumbing (Notifiable Work)

	A: The Admin Officer can either reject the application and require resubmission with the correct information OR reclassify the work within the submitted screen. An additional invoice can be raised.
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## Amend a Previously Issued Permit – Plumbing

Amend a Previously Issued Permit – Plumbing	
Learning activities	8. Amend a Previously Issued Permit – Plumbing
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, an applicant can apply for an amendment to an issued permit or certificate.</li> <li>- The application and assessment process for an amendment follows the same process as the initial permit or certificate.</li> <li>- On application, the applicant will be prompted to provide details of the amendment.</li> <li>- The application for amendment will be available to council users as per the initial application form.</li> <li>- Assessment functionality is the same as the initial certificate/permit assessment page, with the requirement of stating a reason for amendment.</li> <li>- Assessment fields will be prefilled with information from the initial approval where possible.</li> <li>- For Permit Plumbing work, the applicant will apply for an amendment to the CLC – Plumbing Work. Council user will commence/issue an Amended Plumbing Permit.</li> </ul>

## Administer a Notification of Low Risk (Plumbing) Work form

Administer a Notification of Low Risk Building Work form	
Learning activities	9. Administer Notification of Low Risk Work (Plumbing)
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Unlike other application forms, this form has a simple workflow allowing it to be paid, submitted and completed. Whilst there is an 'Assessment' status, this is for the purpose for confirm the payment is complete and the category of work is Low Risk. T</li> <li>- Admin Officers can use the 'Go to payments' button at the top of the form or search from the navigation bar on the left to see any payment details.</li> <li>- If additional payments are required, council users can raise a request for payment using PlanBuild.</li> </ul>
Questions that may arise	<p><b>Q: What if this is received outside of PlanBuild (E.g. via email or over counter)?</b></p> <p>A: The business can choose to require that these documents be lodged via PlanBuild, alternatively this form can be created by a council user on their behalf.</p>



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## Plumbing Application Assessment Training Package



# Plumbing Application Assessment Training Course

Course Title – Plumbing Application Administration Training Course	
Time	
Audience	Plumbing Permit Authorities <i>Plumbing Admin Officers (if assigned user role)</i>
Requirements/resources	<ul style="list-style-type: none"> <li>- Application for CLC Plumbing Work (Permit Work) in the Assessment Status               <ul style="list-style-type: none"> <li>o This application can be used for activity #3</li> <li>o This application can be used for activity #4</li> </ul> </li> <li>- Application for CLC Plumbing Work (Notifiable Work) in the Assessment Status</li> <li>- Start Work Notification in the Assessment Status</li> <li>- Mandatory Stage Notification – Plumbing in the Assessment Status</li> <li>- Lodgement of a Standard of Work Certificate – Plumbing Work               <ul style="list-style-type: none"> <li>o The application for CLC Plumbing Work (Notifiable Work) can be used for this activity.</li> </ul> </li> <li>- Application for CLC Plumbing Work (Permit Work) in the Assessment Status               <ul style="list-style-type: none"> <li>o This application is to be refused.</li> </ul> </li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. Assess a plumbing application that is for CLC-Plumbing (Notifiable Work)</li> <li>2. Assess a Plumbing Application that is for CLC-Plumbing (Permit Work) &amp; requires a RFI           <ol style="list-style-type: none"> <li>2.1 with payment required</li> </ol> </li> <li>3. Issue a Plumbing Permit with Conditions</li> <li>4. Amend a previously issued Permit - Plumbing (Optional)</li> <li>5. Receive Mandatory Stage Notification - Plumbing</li> <li>6. Issue an Inspection Direction</li> </ol>

**Course Title – Plumbing Application Administration Training Course**

	<p>7. Receive a Start Work Notification - Plumbing</p> <p>8. Receive Standard of Work Notice</p> <p>9. Issue Certificate of Completion</p> <p>10. Refuse a Plumbing Application with reasons (Optional)</p>
Learning Outcomes	<p>At the end of the session review this list and confirm participants know how to:</p> <ul style="list-style-type: none"><li>- Review an application for Certificate of Likely Compliance</li><li>- Review a notification of Low Risk Plumbing Work</li><li>- Manage Mandatory Notification assessment</li><li>- Issue an Inspection Direction</li><li>- Process a Start Work Application</li><li>- Review a Standard of Work Certificate</li><li>- Issue a Certificate of</li></ul>

## Assess a Plumbing CLC Application (Notifiable Work)

Assess a Plumbing CLC Application (Notifiable Work)	
Learning activities	1. Assess a plumbing application that is for CLC-Plumbing (Notifiable Work)
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The Plumbing CLC application caters for both Permit Plumbing Work and Notifiable Plumbing work. The output of this application and assessment will be a CLC only.</li> <li>- Applicants are required to nominate the category of plumbing work on the application form, however this can be amended by either the Admin Officer on the 'Submitted' status or the Assessing Officer on the 'Assessment' status.</li> <li>- For Permit Plumbing work, a council user will create and issue a separate Plumbing Permit</li> <li>- Plumbing CLC application will be validated by Admin Officer prior to becoming available to an Assessing Officer. It is expected that by the time the application is referred for assessment the necessary steps have been taken to confirm that the application is valid and any required payment made</li> <li>- Once the application has been reviewed by an Administrative Officer it will be moved to 'Assessment' status. The CLC statutory clock starts at this point.</li> <li>- The CLC assessment clock is paused at the point that a Request for Further Information is raised. The clock resumes once the Assessing Officer has acknowledged the further information response.</li> <li>- Permit Authorities and others users with the Assessing Officer role will have view-only access to the CLC.</li> <li>- Admin Officers will be able to view applications once they have referred for assessment but they will not be able to update the application unless they have the user permissions to do so.</li> <li>- If determined by the Assessing Officer that the category/value of work/classification or other detail of the plumbing application is wrong, this detail can be amended by council and an additional invoice raised.</li> <li>- CBOS licensee information will be available within the form. This will detail whether the licence is current, the scope and type of licence as well as any licence conditions. This will remove the need to search licence information via the CBOS website.</li> </ul>

## Assess a Plumbing CLC Application (Notifiable Work)

Questions that may arise	<p><b>Q: What if an application for Plumbing CLC is submitted with the incorrect category of work specified.</b></p> <p>A: The Assessing Officer can either refuse the application and require resubmission with the correct information OR reclassify the work within the submitted screen. An additional invoice can be raised.</p>

## Assess a Plumbing CLC/Permit Application

Assess a Plumbing CLC/Permit Application	
Learning activities	<p>2. Assess a Plumbing Application that is for CLC-Plumbing (Permit Work) &amp; requires a RFI</p> <p>2.1 with payment required</p>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The Plumbing CLC application caters for both Permit Plumbing Work and Notifiable Plumbing work. The output of this application and assessment will be a CLC only. Applicants are required to nominate the category of plumbing work on the application form, however this can be amended by either the admin officer on the 'Submitted' status or the Assessing Officer on the 'Assessment' status.</li> <li>- For Permit Plumbing work, a council user will create and issue a separate Plumbing Permit</li> <li>- Plumbing CLC application will be validated by admin staff prior to becoming available to an Assessing Officer. It is expected that by the time the application is referred for assessment the necessary steps have been taken to confirm that the application is valid and any required payment made</li> <li>- Once the application has been reviewed by an administrative user it will be moved to 'Assessment'. The CLC statutory clock starts at this point.</li> <li>- The CLC assessment clock is paused at the point that a Request for Further Info is raised. The clock resumes once the Assessing Officer has acknowledged the further information response.</li> <li>- Permit Authorities and others users with the Assessing Officer role will have view-only access to the CLC</li> <li>- Admin Officers will be able to view applications once they have referred for assessment but they will not be able to update the application unless they have the user permissions to do so</li> <li>- If determined by the Assessing Officer that the category/value of work/classification or other detail of the plumbing application is wrong, this detail can be amended by council and an additional invoice raised.</li> <li>- CBOS licensee information will be available within the form. This will detail whether the licence is current, the scope and type of licence as well as any licence conditions. This will remove the need to search licence information via the CBOS website.</li> </ul>

## Assess a Plumbing CLC/Permit Application

Questions that may arise	<p><b>Q: What if an application for Plumbing CLC is submitted with the incorrect category of work specified.</b></p> <p>A: The Assessing Officer can either refuse the application and require resubmission with the correct information OR reclassify the work within the submitted screen. An additional invoice can be raised.</p>

## Issue a Plumbing Permit

Issue a Plumbing Permit	
Learning activities	3. Issue a Plumbing Permit with conditions
Trainer Notes and points to cover	<ul style="list-style-type: none"><li>- In PlanBuild, a Plumbing Permit is a separate form to the CLC for Permit Plumbing Work.</li><li>- Once a CLC has been finalised for Permit Plumbing work, a council user will commence/complete a Plumbing Permit form.</li><li>- The Plumbing Permit form can be commenced and completed by either an Admin Officer or Assessing Officer.</li><li>- The Permit includes functionality to apply conditions, these are separate to the conditions applied to the CLC.</li><li>- The Mandatory notification/inspection staged nominate on the CLC will be carried forward to the permit. These stages will be on both output PDFs.</li><li>- CBOS licensee information will be available within the form. This will detail whether the licence is current, the scope and type of licence as well as any licence conditions. This will remove the need to search licence information via the CBOS website.</li><li>- An expiry notification will be sent to the applicant when the expiry date of the permit is 42 and 14 days away.</li></ul>

## Post CLC/Permit Authorisations

Post CLC/Permit Authorisations	
Learning activities	<ol style="list-style-type: none"> <li>4. Receive a Start Work Notification - Plumbing</li> <li>5. Receive Mandatory Stage Notification - Plumbing</li> <li>6. Issue an Inspection Direction</li> <li>7. Receive Standard of Work Notice</li> </ol>
Trainer Notes and points to cover	<p><b>Start Work Notification and Authorisation</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, a licensee can apply for authorisation to start work.</li> <li>- The Start Work Notification will be available to an Assessing Officer to review.</li> <li>- The Assessing Officer can either authorise or refuse a Start Work Notice.</li> <li>- There is provision to add mandatory notification stages to a Start Work Authorisation.</li> <li>- The Assessment screen include a section that can be used for notes that will be supplied to the applicant upon approval or refusal.</li> <li>- Approval will result in a Start Work Authorisation form.</li> </ul> <p><b>Mandatory Notification Stages</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, an applicant or licensee can notify the Permit Authority upon reaching a mandatory notification stage.</li> <li>- The applicant or licensee can provide comment and upload documentation as part of their notification.</li> <li>- The Assessing Officer can use the mandatory notification function in PlanBuild to record the outcome of a notification/inspection.</li> <li>- An inspector may choose to use the notification assessment function onsite on a mobile device. This could be used to upload photos and notify the applicant of the outcome immediately.</li> </ul> <p><b>Plumbing Inspection Directions</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, as Assessing Officer can issue an Inspection Direction to a licensee.</li> <li>- Upon issue of an inspection direction, the licensee will be notified.</li> </ul> <p><b>Standard of Work Certificate</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, a licensee can draft and submit a Standard of Work Certificate.</li> <li>- Once submitted, the plumbing Assessing Officer and Admin Officer will receive notifications.</li> </ul>



## Issue Certificate of Completion

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Issue a Certificate of Completion	
Learning activities	8. Issue Certificate of Completion
Trainer Notes and points to cover	<ul style="list-style-type: none"><li>- In PlanBuild, an Admin or Assessing Officer can issue a Certificate of Completion.</li><li>- As part of this form, the user has the ability to raise an invoice, request further information or refer internally.</li><li>- Upon issue of a Certificate of Completion, the Plumber/s, Applicant and Owner will receive a notification.</li><li>- An expiry notification will be sent to the applicant when the expiry date of the certificate is 42 and 14 days away.</li></ul>

## Refuse a Plumbing Application

Refuse a Plumbing Application	
Learning activities	9. Refuse a Plumbing Application with reasons (Optional)
Trainer Notes and points to cover	<p><b>Rejecting an application</b></p> <ul style="list-style-type: none"><li>- In PlanBuild, an Admin Officer can reject a submitted application.</li><li>- Upon rejecting an application, the user will be prompted to give a reason for rejection.</li><li>- The applicant will receive a notification upon rejection and the application status will change to 'Rejected'.</li><li>- The applicant can view the 'Rejected' status, where the reason for rejection will be displayed.</li></ul> <p><b>Refusing an application</b></p> <ul style="list-style-type: none"><li>- In PlanBuild, an Assessing Officer will have the option to refuse an application for CLC Plumbing Work once it has progressed to the 'Assessment' status.</li><li>- The Assessing Officer can detail the reason for refusal on the assessment screen.</li><li>- Upon refusal, the applicant will receive a notification and have access to a refusal PDF output. The PDF output will include the reason for refusal.</li><li>- The status of the application will be changed to 'Refused'.</li></ul>

## Amend a Previously Issued Permit – Plumbing

Amend a Previously Issued Permit – Plumbing	
Learning activities	10. Amend a Previously Issued Permit – Plumbing
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- In PlanBuild, an applicant can apply for an amendment to an issued permit or certificate.</li> <li>- The application and assessment process for an amendment follows the same process as the initial permit or certificate.</li> <li>- On the Application page, the applicant will be prompted to provide details of the amendment.</li> <li>- The application for amendment will be available to council users as per the initial application form.</li> <li>- Assessment functionality is the same as the initial certificate/permit assessment screen, with the addition of a reason for amendment.</li> <li>- Assessment fields will be prefilled with information from the initial approval where possible.</li> <li>- Upon approval of an amended Permit, the relevant, previously issued, permit's status will be changed to 'Superseded',</li> <li>- For Permit Plumbing work the applicant will apply for an amendment to the CLC – Plumbing Work. Council user will commence/issue an Amended Plumbing Permit.</li> </ul>



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## Surveying Services Training Package

## Surveying Services Training Course

Course Title – Planning Application Assessment Training Course	
Time	2 hours (One day)
Audience	Surveying Services
Requirements/resources	<ul style="list-style-type: none"> <li>- Strata title application in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to be supported with the following documents:                   <ul style="list-style-type: none"> <li>▪ Covering letter</li> <li>▪ Strata Plans</li> <li>▪ Councils fee for a Certificate of Approval</li> </ul> </li> </ul> </li> <li>- Strata title application in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to be refused.</li> <li>o This application is to be supported with the following documents:                   <ul style="list-style-type: none"> <li>▪ Covering letter</li> <li>▪ Strata Plans</li> <li>▪ Councils fee for a Certificate of Approval</li> </ul> </li> </ul> </li> <li>- Strata title application in the Submitted Status               <ul style="list-style-type: none"> <li>o This application is to be rejected</li> </ul> </li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. Receive &amp; assess a Lodgement of Final Plan for a Subdivision</li> <li>2. Receive &amp; assess a Strata Title Application</li> </ol>
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> <li>- Validate a submitted Application</li> <li>- Review the Application</li> <li>- View, download &amp; edit documents</li> <li>- Request further information and internal/external referrals</li> <li>- Move application from submitted to assessment</li> </ul>

**Course Title – Planning Application Assessment Training Course**

- Complete an Application assessment in PlanBuild
- Stamp and sign documents
- Add conditions
- Reject an Application
- Refuse an Application

## Lodgement of Final Plans

Lodgement of Final Plans	
Learning activities	1. Receive & assess a Lodgement of Final Plan for a Subdivision
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The initial application for subdivision will follow the same process as an Application for Planning Permit, where the applicant will select a 'subdivision' checkbox on the application.</li> <li>- A final plan can be lodged once a planning permit has been issued and all conditions of that permit precedent to the sealing of the final plan have been met.</li> <li>- The applicant will be able to complete the 'Lodge Final Plans for Sealing (Subdivision)' form attaching the final plans and schedule of easements.</li> <li>- The organisation will receive a task to 'Acknowledge submitted Submit Final Plans form', unlike the Application for Planning Permit there is only one 'Submitted' status for Final Plans. This will mean the assessment will be once accepted.</li> <li>- At 'Submitted' status the officer can:               <ul style="list-style-type: none"> <li>o Request TasWater Consent;</li> <li>o Internal Referral;</li> <li>o Raise an Invoice; or</li> <li>o Request Additional Information.</li> </ul> </li> <li>- During the 'Assessment' status the assessor can:               <ul style="list-style-type: none"> <li>o Record details of the assessment;</li> <li>o Stamp approved documents;</li> <li>o Request TasWater Consent;</li> <li>o Internal Referral;</li> <li>o Raise an Invoice; or</li> <li>o Request Additional Information.</li> </ul> </li> <li>- The assessor can either approve and issue the approval or refuse the application.</li> <li>- If refused the 'Reason for Refusal' field will be displayed on the output.</li> <li>- You can preview either output by selecting the 'Preview Output' checkbox on the 'Review &amp; Confirm' screen.</li> </ul>

## Lodgement of Final Plans

Questions that may arise	<p><b>Q: How can I view details of the original Planning Application?</b></p> <p>A: You can navigate back to the Sub Project Summary page to view 'Submitted or Active Applications/Forms'.</p>



## Strata Title Application

Assess an application and raise RFI	
Learning activities	<p>2. Receive &amp; assess a Strata Title Application</p> <p>2.1 Generate an RFI</p>
Trainer Notes and points to cover	<p><b>Receive &amp; Assess Strata Title Application</b></p> <ul style="list-style-type: none"> <li>- In PlanBuild, the strata application form is used for the following Strata Title Application types: <ul style="list-style-type: none"> <li>o Strata title (including individual stages of a development scheme)</li> <li>o Amendments of a strata title</li> <li>o Staged development scheme</li> <li>o Community development scheme</li> </ul> </li> <li>- The applicant will nominate on the form which of the above types they are applying for and have a field to enter a reference for the relevant or related Planning Permit reference.</li> <li>- The organisation will receive a task to 'Acknowledge submitted Strata Title Application form', unlike the Application for Planning Permit there is only one 'Submitted' status for Strata. This will mean the assessment will be once accepted.</li> <li>- At 'Submitted' status the officer can: <ul style="list-style-type: none"> <li>o Internal Referral;</li> <li>o Raise an Invoice; or</li> <li>o Request Additional Information.</li> </ul> </li> <li>- During the 'Assessment' status the assessor can: <ul style="list-style-type: none"> <li>o Stamp approved documents;</li> <li>o Internal Referral;</li> <li>o Raise an Invoice; or</li> <li>o Request Additional Information.</li> </ul> </li> <li>- The assessor can either approve and issue the approval or refuse the application.</li> <li>- If approved the applicant will receive information that "The application will not be considered valid until they have provided council with a hard copy Strata Plan".</li> </ul>

## Assess an application and raise RFI

- If refused the 'Reason for Refusal' field will be displayed on the output.
- You can preview either output by selecting the 'Preview Output' checkbox on the 'Review & Confirm' screen.

### Raise an RFI

- If further information is required, you can request further information using the 'Request Further Information' button.
- You will be able to select anyone associated with the Project from the drop down. You can see who the applicant is on the parent assessment page if unsure.
- You can nominate 'RFI Reasons' from a library or add a custom request/reason.
- Once a response is received, you will receive a task to review and confirm the response is sufficient.
- If the information is insufficient a new 'Request for Information' can be raised and the same process followed, until sufficient information is provided.

Questions that may arise

**Q: How can I view details of the original Planning Application?**

A: You can navigate back to the Sub Project Summary page to view 'Submitted or Active Applications/Forms'.



**PlanBuild**  
TASMANIA

Finance  
Training Package

## Finance Training Course

Course Title – Finance Training Course	
Time	1 hour
Audience	Financial Officers
Requirements/resources	Payment for an application made in PlanBuild
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. Receive remittance advice from PlanBuild</li> <li>2. Search and view payments in PlanBuild</li> <li>3. Record details of payments/refunds</li> </ol>
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> <li>- Receive and review the remittance advice from PlanBuild</li> <li>- Search and view payment details</li> <li>- Record details of payments/refunds</li> </ul>

## Finance Processes

Receive remittance advice from PlanBuild	
Learning activities	<ol style="list-style-type: none"> <li>1. Receive and review the remittance advice from PlanBuild</li> </ol>
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- The Department of Justice (DoJ) Finance Department will receive the bank file for all payments processed for that business day, and will deduct and distribute the CBOS building administration fee and Keystone industry training levy, the remaining funds will be disbursed to the nominated council bank account.</li> <li>- Department of Justice (DoJ)/PlanBuild Tasmania will send councils a daily payment file for all PlanBuild payments processed for that business day. The payment file will be issued automatically to an email account nominated by the council.</li> <li>- DoJ will transfer the actual funds received, less the Consumer, Building and Occupational Services (CBOS) building administration fee and Keystone industry training levy, to councils the same evening that the payment file is sent to councils. DoJ Finance will also send to council a brief remittance advice detailing the amount transferred to the council's bank account.</li> </ul>
Questions that may arise	<p><b>Q: If there is an issue with the PlanBuild Tasmania disbursement file, who should the council contact?</b></p> <p>A: In PlanBuild Tasmania, council staff will be able to search by Payments which will include sufficient data to identify what the payment was for, the amount paid etc.</p> <p>If there are still queries, councils will be provided details on how to contact the PlanBuild Support Team (initially this will be: support@planbuild.tas.gov.au) for any PlanBuild payment related matters. The DoJ Finance Team will be able to send payment related information, such as late bank file process etc., to a nominated person via email or email box.</p>

## Search and View Payments

Search and View Payments	
Learning activities	2. Search and view payments in PlanBuild
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Any council user can view details of payment within their organisation by selecting the 'Payments' option from the navigation bar on the left.</li> <li>- Filters can be applied and exported to CSV file from this screen.</li> <li>- Council users can open individual payments to see details, download payment summaries and record payment details.</li> <li>- Customers can follow the same process to see payment details of any payments they have made using PlanBuild.</li> <li>- If a payment exists for an Application, council users will be able to select the 'Go to Payments' button at the top of the application when the Application is under 'Submitted' or 'Assessment' status.</li> </ul>
Questions that may arise	<p><b>Q: Who can view payment details?</b></p> <p>A: Anyone within an organisation can see details of payment made to/by that organisation.</p>

## Record Details of Payments/Refunds

Search and View Payments	
Learning activities	3. Record details of payments/refunds
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Council users are able to add notes and/or record refund details against individual payment records in PlanBuild.</li> <li>- By using the 'Payments' button on the navigation bar on the left, a council user can see all payments made to/by their organisation.</li> <li>- If a payment has been made there will be a 'Go to Payments' button in the task description, this will take the user to the payment search and filter to only payment relating to that application.</li> <li>- Once a payment record has been opened by a council user there is the option to add a note (viewable to all in the organisation) or recorded the details of a refund outside of PlanBuild.</li> </ul>
Questions that may arise	<p><b>Q: Who can make notes against a payment?</b></p> <p>A: Any user in the organisation can view and add</p>



**PlanBuild**  
TASMANIA

## Organisation System Administrators Training Package



## Organisation System Administrators Training Course

Course Title – Organisation System Administration	
Time	1 hour
Audience	Organisation System Administrators
Requirements/resources	<ul style="list-style-type: none"> <li>- Users will need the 'Organisation System Admin' role in PlanBuild.</li> </ul>
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. Edit organisation details</li> <li>2. Update logo</li> <li>3. Update contact information</li> <li>4. Edit fee rates</li> <li>5. Invite or retire users to the organisation</li> <li>6. Edit user permissions</li> <li>7. Add and update electronic signature</li> <li>8. Maintain condition and RFI library</li> </ol>
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> <li>- Ability to complete the tasks assigned to the PlanBuild Tasmania Organisation System Administrator role.</li> </ul>

## Edit Organisation Details

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Learning activities	<ol style="list-style-type: none"><li>1. Edit organisation details</li><li>2. Update logo</li><li>3. Update contact information</li></ol>
Trainer Notes and points to cover	<ul style="list-style-type: none"><li>- The contact details etc. can be edited by any user with the 'Organisation System Admin' role.</li><li>- This role should only be given to a limited number of users as they have control to change financial details.</li><li>- The edit screen can be accessed by the user viewing their 'profile' and switching to the 'Organisation Details' tab. Any user in the organisation can see this screen, those with the 'Organisation System Admin' role can click on the organisation to open and edit details.</li><li>- There is a tab for 'General', 'Images' (for logo) and 'Contact' which can all be updated as required.</li></ul>

## Edit Fee Rates

Edit Fee Rates	
Learning activities	4. Edit fee rates
Trainer Notes and points to cover	<ul style="list-style-type: none"> <li>- Fee rates can be edited by any user with the 'Organisation System Admin' role.</li> <li>- The edit screen can be accessed by the user viewing their 'Profile' and switching to the 'Organisation Details' tab. Any user in the organisation can see this screen, those with the 'Organisation System Admin' role can click on the organisation to open and edit details.</li> <li>- There is a tab for 'Fee Rates' - Use this section to view and edit the Organisations Fee Rate Schedule by selecting the relevant year and opening.</li> <li>- To create a new fee rate schedule, select 'Add Fee Rate Group'.</li> <li>- The Organisation System Admin has the ability to edit the base and unit rates, add ledger codes and nominate if GST applies.</li> </ul>
Questions that may arise	<p><b>Q: Can fee rates be adjusted during the financial year?</b></p> <p>A: Fee rates can be updated at any time. You can create a new fee rate group ahead of time (such as when setting fees for a new financial year) so these can be configured in advance. These fees will not apply until the date set.</p>

## Manage Organisation Users

Manage Organisation Users	
Learning activities	<ol style="list-style-type: none"> <li>5. Invite or retire users to the organisation</li> <li>6. Edit user permissions</li> <li>7. Add and update electronic signature</li> </ol>
Trainer Notes and points to cover	<p><b>Invite / retire users</b></p> <ul style="list-style-type: none"> <li>- Users can be invited and managed by any user with the 'Organisation System Admin' role.</li> <li>- The edit screen can be accessed by the user viewing their 'Profile' and switching to the 'Organisation Details' tab. Any user in the organisation can see this screen, those with the 'Organisation System Admin' role can click on the organisation to open and edit details.</li> <li>- The 'Active Members' section shows any users currently in the organisation, you can retire a user by selecting the 'unlink' action button.</li> <li>- The 'Pending Invites' tab can be used to invite a user to an organisation or see requests which are yet to be accepted (from here you can cancel or re-send the invitation).</li> <li>- When inviting a new user to an organisation, the user must first register for an individual account. An invitation can then be sent to the email address used to register.</li> <li>- You can set the new users 'Roles' and 'Departments' (each role explained below) when sending the invitation, or these can be added/edited at any time.</li> </ul> <p><b>User roles</b></p> <ul style="list-style-type: none"> <li>- Users can be assigned 'Roles' which will determine what types of tasks can be claimed (e.g. assessment tasks can only be claimed by a user with the 'Assessing Officer' role).</li> <li>- Users can be assigned 'Departments' which will determine the sub project types will appear in the 'Organisation Tasks' section, for councils this will have the pre-fix 'Permit Authority –' and then the sub project type (e.g. 'Permit Authority – Building' will only see building related tasks).</li> <li>- All users in a council organisation will be required to have the standard 'Permit Authority' department, if they do not hold this role they will not see any tasks within the organisation. Anyone with this</li> </ul>

role can view tasks/applications across all departments, but can only claim tasks when they have the relevant sub project department.

### **Signatures**

- Signatures can be added from the organisation admin screen, if someone has a signature uploaded against their user profile for the organisation they will be able to sign, approve and issue determinations.
- The 'Signatory Delegate' role can be given to users who are authorised to sign document on behalf of others.
- Note that if a 'Signatory' gives approval for their signature to be used by Signatory Delegates, any user in the organisation who is assigned the 'Signatory Delegate' role will be able to use it (i.e. you will not be able to nominate which individual user can use your signature).

## **PLANBUILD ROLES**

### **Admin Officer**

- View applications, check applications, raise invoices, advertise, generate templates, request information and refer applications (internally and externally).

### **Assessing Officer**

- View/assess applications, validate applications, refer applications (internally and externally), generate templates (e.g. RFIs, permits etc.), add conditions to permits etc.

### **Compliance Officer**

- Generate orders, notices etc., refer applications, generate templates etc.

### **Signatory**

- This role is assigned to an Assessing Officer who is a signatory for permits / certificates.

### **Signatory Delegate**

- This role is assigned to an Administration or Assessing Officer who is the delegate for other parties and can use their signature for permits / certificates.

### **Work Admin**

	<ul style="list-style-type: none"> <li>- This role will be assigned to managers to allow them to view, assign and re-assign tasks across all staff in their Department.</li> </ul> <p><b>Signatory Delegate</b></p> <ul style="list-style-type: none"> <li>- This role is assigned to an Administration or Assessing Officer who is the delegate for other parties and can use their signature for permits / certificates.</li> </ul> <p><b>Organisation System Admin</b></p> <ul style="list-style-type: none"> <li>- This role will be assigned to internal system administrators to access the organisation details screen to manage information, users, permissions and libraries.</li> </ul> <p><b>Organisation Reporting</b></p> <ul style="list-style-type: none"> <li>- This role will give users the ability to access the reporting screen to generate pre-built reports. (Note: simple reporting can be done by any user with the 'Permit Authority' department on using the search screens and exporting to CSV.)</li> </ul>

## Maintain Organisation Specific Libraries

8. Maintain condition and RFI library	
Learning activities	8. Maintain condition and RFI library
Trainer Notes and points to cover	<p><b>Condition Library</b></p> <ul style="list-style-type: none"> <li>- The condition library can be managed from the organisation admin screen.</li> <li>- To add a new item to the library, select the 'Add Library Condition' button.</li> <li>- Once added this will be available for users in the Organisation to select when adding conditions to an output.</li> <li>- To edit or remove an existing condition, select the relevant condition and edit/remove accordingly.</li> </ul> <p><b>RFI Reason Library</b></p> <ul style="list-style-type: none"> <li>- To add a new item to the library, select the 'Add Library Referral' button.</li> <li>- Once added this will be available for users in the Organisation to select when creating a referral (internal and external).</li> <li>- When producing a referral request during an Assessment the user can choose to free type a reason for the referral/RFI so this might not be a complete library and can be added to over time.</li> </ul>
Questions that may arise	<p><b>Q: Can an individual organisation user update a library item?</b></p> <p>A: No, the Organisation System Admin role is required to edit the library. However, an Assessing Officer can edit the condition for a particular output once selected from the library (this will not update the library condition).</p>



**PlanBuild**  
TASMANIA

Reporting  
Training Package



## Reporting Training Course

Course Title – Finance Training Course	
Time	30 Minutes
Audience	Users with the 'Organisation Reporting' role
Requirements/resources	Users will need the 'Organisation Reporting' role in PlanBuild.
Pre-requisite courses	<ul style="list-style-type: none"><li>- UO Business Education Program</li><li>- Getting Started with PlanBuild Application Services</li></ul>
Learning Activities	<ol style="list-style-type: none"><li>1. Understand the 'Organisation Reporting' role</li><li>2. Generate a report from a Data Source</li><li>3. Generate a CSV from the application search functions</li></ol>
Learning Outcomes	How to: <ul style="list-style-type: none"><li>- Generate reports using PlanBuild Tasmania</li></ul>

## Reporting in PlanBuild Tasmania

Reporting in PlanBuild Tasmania	
Learning activities	<ol style="list-style-type: none"> <li>1. Understand the 'Organisation Reporting' role</li> <li>2. Generate a report from a Data Source</li> <li>3. Generate a CSV from the application search functions</li> </ol>
Trainer Notes and points to cover	<p><b>Organisation Reporting</b></p> <ul style="list-style-type: none"> <li>- This role will give users the ability to access the reporting page to generate pre-built reports.</li> <li>- Once a user is given this role, the 'Reporting' option will be available in the the navigation bar on the left.</li> <li>- Form here a user can select from a list of pre-set data sources for their organisation or a saved query they have previously completed.</li> <li>- Organisations will not be able to create new data sources themselves, but these can be developed in consultation with the PlanBuild Tasmania team/vendor.</li> </ul> <p><b>Saving a Query</b></p> <ul style="list-style-type: none"> <li>- Once a data source has been 'queried' and filters applied, this can be saved.</li> <li>- To save select 'save' at the bottom of the screen after completing a query. This will add to the list of saved queries available to be run.</li> </ul> <p><b>Application Reporting</b></p> <ul style="list-style-type: none"> <li>- Ad hoc/simple reporting can be done by any user with the 'Permit Authority' department by using the search screens and exporting to CSV.</li> <li>- Filters can be applied within the application search screen prior to generating the CSV, or the complete set of records can be exported (up to 100,000) and filtered in Microsoft Excel (or similar).</li> </ul>
Questions that may arise	<p><b>Q: Can organisations create their own data sources for reporting?</b></p> <p>A: No, these can only be created by the PlanBuild Tasmania vendor in consultation with the PlanBuild Support Team.</p>



**PlanBuild**  
TASMANIA

## Environmental and Public Health Training Package

## Environmental and Public Health Training Course

Course Title – Environmental and Public Health Training Training Course	
Time	
Audience	
Requirements/resources	
Pre-requisite courses	
Learning Activities	
Learning Outcomes	

## Environmental Health Officer (Non - Building) Training Course

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Learning activities	-
Trainer Notes and points to cover	
Questions that may arise	

## Environmental Health Application - Administration

Topics	Trainer Notes and points to cover

## Environmental Health Application - Assessment

Topics	Trainer Notes and points to cover

## Public Health Application - Administration

Topics	Trainer Notes and points to cover



## Public Health Application - Assessment

Topics	Trainer Notes and points to cover



**PlanBuild**  
TASMANIA

Building Application Assessment  
(Internal Building Surveyor)  
Training Package

## Building Application Assessment (Internal Building Surveyor) Training Course

Course Title – Building Application Assessment (Internal Building Surveyor) Training Course	
Time	8 Hours (1 Day)
Audience	<ul style="list-style-type: none"> <li>- Building Permit Authority</li> <li>- Internal Building Surveyor</li> </ul>
Requirements/resources	
Pre-requisite courses	<ul style="list-style-type: none"> <li>- UO Business Education Program</li> <li>- Getting Started with PlanBuild Application Services</li> </ul>
Learning Activities	<ol style="list-style-type: none"> <li>1. (Where council is the Building Surveyor) Assess Application for Certificate of Likely Compliance:               <ol style="list-style-type: none"> <li>1.1 that requires a RFI</li> <li>1.2 referral to Tasmania Fire Service</li> <li>1.3 Environmental Health Officer (set conditions, nominate mandatory stages and stamp documents).</li> </ol> </li> <li>2. (Where council is the Building Surveyor) Issue Building Permit with conditions and stamped documentation</li> <li>3. (Where council is not the Building Surveyor) Assess Application for Building Permit.</li> <li>4. Receive and Authorise a Request to Start Work</li> <li>5. Issue a Building Permit Refusal with reasons</li> <li>6. Amend a previously issued Permit and/or Certificate (administrative Amendment)</li> <li>7. Receive post Permit Authorisation Certificates &amp; Permits from the (non-council) Building Surveyor</li> <li>8. Issue Building Inspection Direction</li> <li>9. Issue Occupancy Permit</li> <li>10. Issue a Certificate of Final Inspection</li> <li>11. Issue Certificate of Completion</li> </ol>

**Course Title – Building Application Assessment (Internal Building Surveyor) Training Course**

	<p>12. Issue Building Notice</p> <p>13. Issue Building Order</p>
<p>Learning Outcomes</p>	<p>Users will learn how to:</p> <ul style="list-style-type: none"> <li>- Receive a submitted Building Application CLC and BP</li> <li>- Review the Building Application</li> <li>- View, download &amp; edit documents</li> <li>- Request further information &amp; internal/external referrals</li> <li>- Request &amp; accept an additional payment</li> <li>- Manage clocks</li> <li>- Complete a Building Application assessment in PlanBuild</li> <li>- Review licence service providers</li> <li>- Review CLC, CRD, CQP</li> <li>- Stamp &amp; sign documents</li> <li>- Add conditions</li> <li>- Approve &amp; issue a Building Permit</li> <li>- Reject or refuse an Application</li> <li>- Find &amp; view a completed Building Permit</li> <li>- Receive Start Work Notifications</li> <li>- Amend a Building Permit</li> <li>- Issue a completion / occupancy certificate</li> <li>- Issue building orders/notices incl. demolition</li> </ul>

## Administer a Building Application that is a combined CLC & Building Permit

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### Administer a Building Application that is a combined CLC & Building Permit

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Learning activities	
Trainer Notes and points to cover	
Questions that may arise	

## Assess Application for Certificate of Likely Compliance

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(Where council is the Building Surveyor) Assess Application for Certificate of Likely Compliance	
Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	

## Issue Building Permit with conditions and stamped documentation

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(Where council is the Building Surveyor) Issue Building Permit with conditions and stamped documentation

Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	

## Assess Application for Building Permit

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(Where council is the Building Surveyor) Assess Application for Building Permit	
Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	



## Receive and Authorise a Request to Start Work

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Receive and Authorise a Request to Start Work	
Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	

## Issue a Building Permit Refusal with Reasons

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Issue a Building Permit Refusal with Reasons	
Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	

## Amend a Previously Issue Permit and/or Certificate (Administrative Amendment)

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Amend a Previously Issue Permit and/or Certificate (Administrative Amendment)	
Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	

## Receive post Permit Authorisation Certificates & Permits from the (non-council) Building Surveyor

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Receive post Permit Authorisation Certificates & Permits from the (non-council) Building Surveyor	
Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	

## Issue Building Certificates and Documentation

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Issue Building Certificates and Documentation	
Learning activities	
Trainer Notes and points to cover	
Questions that may arise	
Other Resources	

