



PlanBuild
TASMANIA

Train the Trainer Manual TasWater

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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"> - Business Education Program
Learning Activities	<ol style="list-style-type: none"> 1. Training Curriculum Overview 2. Introduction to Day-In-The-Life (DILo) Scenario based training 3. Running the training sessions 4. Where to find support & resources
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"> - How to deliver the required courses to end users within your organisation - How to learn the necessary content and facilitation skills to train others confidently and accurately in the use of the PlanBuild Tasmania Application Services functionality - How to use Day-In-The-Life Scenarios for training

Specific aims of PlanBuild Tasmania training

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

Participants undertaking the Train the Trainer Course will:

- learn the necessary content and facilitation skills to train others confidently and accurately 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

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 Tasmania.

Using this Manual

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 Tasmania 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 Tasmania 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

These materials were developed to support Trainers in training end users in the PlanBuild Tasmania 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 Authority Referrals – Administration Support
- Planning Authority Referrals – Assessment
- TasWater Applications – Administration Support
- TasWater Applications – Assessment & Compliance
- Assigning Tasks and Workflow management
- Issuing a Submission to planning authority notice (SPAN) or TasWater Certificate
- Issuing Certificate of Water & Sewerage Compliance
- Reviewing, Managing and creating request to pay (Invoice)
- Organisation Administration

Training Materials

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 will be provided
- 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 available on the PlanBuild website:

Pre-Training Checklist

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

Set up PlanBuild Tasmania

- Ensure all participants have a PlanBuild Tasmania 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
- Review condition and RFI libraries updated (if applicable)
- Review fee rates are configured (if upfront payment applicable)
- Review to ensure templates generate with correct logo (if applicable)
- Test that PlanBuild is accessible from the training room

Print Resources

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

Set up the room

- Save test documents to the laptops or circulate (e.g. plans for the participants to upload)
- Set up the laptops and switch off the timeout for the logon screen – If in training room environment
- Open PlanBuild Tasmania on all laptops – If in training room environment

Other tips

- 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

➤ 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 panel on the left side 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 assessment officer or admin, ensure they are logged into their TasWater profile by clicking on their name in the top right hand corner of the PlanBuild screen and selecting 'TasWater'. A tick will appear against the profile the user is currently signed in with.

Post Training Survey

About you -

1. Which area of the TasWater are you from?
 - Development Support
 - Development Assessment
 - Development Compliance
 - Customer Services
 - Trade Waste
 - 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?

About the training arrangement -

9. Was the training conducted in a comfortable place?
- Yes.
 - No. Please tell us what needs to be improved:
10. Are you happy with the training time slot(s)?
- Yes.
 - No. Please tell us what days or hours is more suitable for you:
11. Was the training program interactive and engaging?
- Yes.
 - No. Please tell us what needs to be improved:

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"> - All end-users - TasWater PlanBuild System Administrator
Requirements/resources	<ul style="list-style-type: none"> - Not applicable
Pre-requisite courses	<ul style="list-style-type: none"> - Business Education Program
Learning Activities	<ol style="list-style-type: none"> 1. User registration 2. Dashboard Navigation 3. Searching and References 4. PlanBuild Hierarchy and Navigation 5. PlanBuild Statuses 6. Document Management 7. Notes and Attachments 8. Managing Clocks 9. Reviewing, managing and creating Request to Pay (invoice) 10. <i>Manage task allocation (for specific roles only)</i>
Learning Outcomes	<p>At the end of the session participants will:</p> <ul style="list-style-type: none"> - Understand the PlanBuild architecture, basic navigation & workflow - Can assign tasks, use workflow & save records - Can use the help & support functionality and tools - Can manage documents including revisions and document control - Can assign & manage task allocation (for specific roles only)

User Registration

User Registration	
Learning activities	<ol style="list-style-type: none"> 1. Create a new user 2. Reset your password 3. View Organisation Details 4. View Licensee Details
Trainer Notes and points to cover	<ul style="list-style-type: none"> - The user registration process is similar to registering for most websites. - The users will be sent an email to verify they have created their user profile. - TasWater will have control over creating users and will be able to set these up when new staff start. - TasWater will be able to assign the appropriate user role to these users (eg admin, assessment, etc) - Users will be able to add an electronic signature to their user profile. - Users can also delegate their signature to other parties in their organisation – This is not relevant for TasWater. - Users can have an 'individual' profile and an 'organisation' profile. - User permissions 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.
Questions that may arise	<p>Q: Are there any password requirements? A: There must be at least 9 characters; and include a lowercase letter, an uppercase letter, and a number.</p> <p>Q: What happens if an email address is shared? A: A unique email address is required and cannot be used more than once.</p> <p>Q: I haven't received the auto email after completing my 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.</p> <p>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.</p>

Dashboard Navigation

Dashboard Navigation	
Learning Activities	<ol style="list-style-type: none"> 1. Find a task currently assigned to you from the dashboard 2. Find and claim a task currently assigned to someone else in your organisation from your dashboard
Trainer Notes and points to cover	<p>Trainers should demonstration using the system the following navigation overview:</p> <p>PlanBuild Mailbox</p> <ul style="list-style-type: none"> - Notifications will appear in your PlanBuild mailbox when certain actions are performed (such as a task being assigned to you). - The email address used when registering will also receive a copy of this notification via email. <p>Logged in user details</p> <ul style="list-style-type: none"> - The top right hand of the ribbon menu shows the logged in user details. - This can be used to switch between organisation profiles (if user has multiple), or access profile setting. - This can also be used to 'sign out'. <p>Create a Project</p> <ul style="list-style-type: none"> - You can create a project by selecting 'Create a Project' and follow the prompts. This will be covered in detail in 'Creating a Project'. <p>Side bar menu</p> <ul style="list-style-type: none"> - Home – Used to return to the dashboard, you can also select the PlanBuild Tasmania logo in the banner menu to return to the dashboard. - Search – You can select the dropdown to search by different categories. This will be covered in detail in 'Searching'. - Payments – You can see the details of any payments made as an individual or for your organisation. - Reporting – This will only appear if you are required to access the reporting functionality. - Help – This can be used to access additional help resources. <p>Task Filter</p> <ul style="list-style-type: none"> - You can search for tasks using the search bar.

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>My Enquiry List</p> <ul style="list-style-type: none">- 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>
Questions that may arise	<p>Q: I cannot view a task that I should be able to view?</p> <p>A: Confirm that the user has the correct user permissions for their role. This can be done by a System Administrator using the Organisation Details screens.</p> <p>Q: How do I see tasks assigned across the organisation?</p> <p>A: Navigate to the 'Tasks' search screen on the left hand side navigation bar and use the search criteria to see tasks in your organisation.</p> <p>Q: Why can I not see a task that I have just completed?</p> <p>A: Once a task is completed it is no visible within the task search section and is removed from "My Task List"</p>

PlanBuild Hierarchy and Navigation

PlanBuild Hierarchy	
Learning Activities	1. Create a project
Trainer Notes and points to cover	<p>PlanBuild Hierarchy</p> <ul style="list-style-type: none"> - PlanBuild has a hierarchy of: <ul style="list-style-type: none"> o Property o Project o Sub Project o Application o Tasks - All applications must be related to a property address. - Actions on a project/sub-project are driven by forms or tasks. - Users should be made aware of how to navigate from project, sub-project, to application by using the 'Project Panels'. - The PlanBuild Tasmania icon in top banner will take the user back to their Dashboard. - The 'Burger' icon will hide the left hand side navigation bar.
Questions that may arise	<p>Q. What if the address is unavailable?</p> <p>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'. This will be covered in another course.</p>

Searching and References

Searching	
Learning Activities	<ol style="list-style-type: none"> 1. Search for a property and identify projects and sub-projects recorded for that property 2. Search for a specific application form using the Application Search function 3. Search and assign a task from one user to another user in your organisation
Trainer Notes and points to cover	<p>Searching</p> <ul style="list-style-type: none"> - Searching can occur from the left hand side navigation bar - Users can search by a property, project, sub-project or task - 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). - Search results can be exported. 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. - Managers can track workload using the Task Search option, with the ability to view across their Department / Organisation. - 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). <p>PlanBuild References</p> <ul style="list-style-type: none"> - PlanBuild creates a unique identifier for a project, sub-project and an application. - The prefix for the reference will be the year, however the latter parts of the reference will be randomly generated. - Users can enter their own 'External Reference Number'. - This can be at the user's discretion (e.g. it may be a reference to the organisations records management system). - The External Reference Number will be displayed in the top navigation bar and will be able to be searched using the 'Search' functionality.

Searching

Questions that may arise

Q. Can TasWater add their own unique reference numbers?

A: TasWater may choose to use the 'External Reference' section to enter an internal reference number. This can then be searched by searching by 'application'.

However, it will not be undertaken by TasWater as reference codes have already been set, configured per form for TasWater.

TasWater will be referenced as TASWA.

TASWACCW – TasWater Certificate for Certifiable Work

TASWACCWAM - TasWater Certificate for Certifiable Work Amended

Sample reference number - TASWACCW-HOB-2023-KY2L

The relevant permit authority code (HOB- CoH) and year will be applied, with random numbers and letters for the last four digits.

PlanBuild Statuses

PlanBuild Statuses	
<p>Trainer Notes and points to cover</p>	<p>Statuses</p> <ul style="list-style-type: none"> - PlanBuild applications are largely broken into 4 key statuses – Draft, Submitted, Assessment, Completed, however statuses may vary depending on the application type. - Statuses can be viewed using the ‘Status Chevron’ - 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. - To move an application from one status to another relies on the completion of a task. - Some users will not be able to edit applications in particular statuses (e.g. assessment) if they do not have the assessor role.
<p>Questions that may arise</p>	<p>Q. Will all PlanBuild user be able to see all my tasks completed?</p> <p>A: As per your current workflow system all Planbuild user will be able to view the status of task and completed status information.</p> <p>Q. Can I move an application to a previous status?</p> <p>A: No, once an application has moved to a new status you will not be able to move it back. A review & 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>Overview of clocks</p> <ul style="list-style-type: none">- Now that users have viewed the statuses, trainers can provide an overview of how the clocks will work.- Clocks are set at the form level (e.g. a planning application form will have its own clock)- Some forms will not have a clock set (as it does not apply). In these cases the due date will not be displayed.- Clocks can be managed by users with the user role to do so- Some forms (e.g. a planning application) will be determined by the Assessment Officer before they start the assessment clock <p>Updating the clock</p> <ul style="list-style-type: none">- PlanBuild has included substantial functionality to manage clocks and to ensure that they were not able to be changed without appropriate process.- When an Assessment Officer has selected to start the assessment, the user will select the start date and select the period<ol style="list-style-type: none">1. Using the Extension of Time (EOT) request to the applicant, which they must respond to; or2. Using the Adjust Assessment Timeframe <p>Extension of Time</p> <ul style="list-style-type: none">- Assessment officers should use the EOT where a notification is required to an application <p>Adjust Assessment Timeframe</p> <ul style="list-style-type: none">- Assessment Officers 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.- The Assessment Officers can select themselves if they are authorised to adjust the clock, alternatively they can select to send this to another officer who can review and approve the change.

Managing Clocks

Learning Activities	Understanding as to how PlanBuild replicates legislative obligations for all parties, however allowing some flexibility.
Questions that may arise	Q. How does the system cater for public holidays? 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>Document overview</p> <ul style="list-style-type: none">- A key benefit of PlanBuild is to allow for the sharing of documents with parties involved in the project (e.g. the applicant, the permit Authorities, Building Surveyors etc).- 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.- This functionality will be covered in detail in specific subject training courses. <p>Revisions</p> <ul style="list-style-type: none">- 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.- The Revision Date is the date on the document itself (e.g. the date on a plan)- Users can add one or many documents at once.- 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.- 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, may choose to separate these into their own unique documents. <p>Available Documents vs Supporting Documents</p> <p>For an applicant:</p> <ul style="list-style-type: none">- 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.

Document Management

- 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 /Referral Authority to view.
- The Assessment Officers can then select some or all of these documents to be included in the 'Document Pack'. These are the documents that will be provided back to the applicant when the assessment is finalised.
- Where the application is approved, documents that are in the Document Pack can be stamped to show they are approved documents.
- This will be covered in more detail in specific subject training courses.

Questions that may arise

Q. I cannot find the appropriate attachment type for my upload

A: If there is not a specific 'Document Type' for your document, use 'Other'

Q. I have submitted my application but want to view the documents that I uploaded to support it

A: An applicant can navigate to the Draft status of a submitted application form to view all documents uploaded.

Q. I do not want to stamp all pages of a document, how can I separate?

Document Management

A: An Assessment Officers can download a document and make required edits (external stamping, markups or removing pages) and reupload the document as either a new document or a revision of an existing document.

Q. I have received a revised version of a document outside of PlanBuild, how can I record this against the application?

A: An Assessment Officers can add a new document from within their assessment screen.

Notes and Attachments

Notes and Attachments	
<p>Trainer Notes and points to cover</p>	<p>Notes</p> <ul style="list-style-type: none"> - 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). - 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). - 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. - 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. <p>Attachments</p> <ul style="list-style-type: none"> - To upload an attachment you can toggle to the 'Attachment' tab. Here you can store any correspondence with an applicant externally of PlanBuild (e.g. emails).
<p>Questions that may arise</p>	<p>Q. Who can view the internal notes and attachments section?</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. Once TasWater adopts this position.</p> <ul style="list-style-type: none">- PlanBuild will charge upfront if the organisation fee rates are within PlanBuild.- Payments can be made using credit card or BPay.- Credit card payments over \$10,000 is not permitted <p>Upfront payments only</p> <ul style="list-style-type: none">- Fees will be calculated based on the fee types configured against the forms and the applicant classification of work selection and per TasWater's Price and Services plan.- TasWater are not adopting upfront payments initially, however, will move to upfront payments. Any user can raise a request for payment after the application has been submitted and assessed.- When making a payment, the user can select the payment type from credit card or BPay.- If additional payments are required after submission, a user can raise a request for payment after the application has been submitted. <p>Requests for Payment</p> <ul style="list-style-type: none">- As TasWater are not initially adopting upfront payments, a user can raise a request for payment after the application has been submitted and or at the time of issuing the certificate. All Users can create request to pay (invoices)- This will create a task for the applicant to log in and make a payment using credit card or BPay. <p>Payment Details</p> <ul style="list-style-type: none">- Any user within your organisation has the ability to search for payment details for applications.- There is a button on the submitted and assessment screens which will take the user to any payment details associated with the application.

Payments

Questions that may arise

Q. What happens if an applicant has selected the wrong classification of work?

A: The assessment officer as part of their assessment determines the relevant classification code and applicable assessment fees & charges. (Once TasWater goes live with upfront payments – new business rules may need to be defined)

Allocating Tasks

Managing task allocation (for specific roles only)	
Trainer Notes and points to cover	<p>Allocating Tasks</p> <ul style="list-style-type: none"> - Tasks can be assigned to other users as required - Users who have the appropriate 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. - Where multiple users are set up as admin or assessor role within a department, a new application/task will be 'Unassigned' upon progressing. For example, when a new Planning Application referral is received and TasWater has more than one user set up with the Administration role within the department, the application will be unassigned. Where there is a single user with the relevant permissions, all relevant tasks will be assigned to them directly. - Tasks can be assigned to other users as required - Users who have the appropriate 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. - 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.
Questions that may arise	<p>Q. Can I pull a report on all allocated tasks?</p> <p>A: Yes, reports can be pulled on the number of tasks.</p>

Managing task allocation (for specific roles only)

Q. Can I provide access to another user to allocate out tasks whilst I am on leave?

A: Yes, the organisation system administrator will need to add the relevant role to the user.

Q. My profile does not have the ability to allocate tasks?

A: You need to have the 'Work Admin' role in PlanBuild to be able to assign/re-assign tasks from the task search screen.

Understanding Enquiries

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

Understanding Enquiries

Questions that may arise

Q. Why is this request advice functionality being switched on for TasWater?

A: The 'Request Advice' function would be for anyone who has used the Enquiry Service in PlanBuild. It is just another channel for an enquirer to lodge an enquiry directly with TasWater.

Q. When will this request advice functionality be switched on for TasWater?

A: A date is still to be confirmed; however we feel that this will be switched on shortly and it may align with the Application Services Go live date.

Q. How will these request be managed?

A: As enquirers may not be registered users of PlanBuild (in the way that they will need to be for lodging CCWs etc and once referred to TasWater the Request Advice functionality in PlanBuild ceases i.e. there is no response through PlanBuild.

Given that the enquiries are directly development-related approval have given to use the Development Inbox (development@taswater.com.au) email address for the referrals.

That way all service enquiries will come into the Development Inbox (and be responded to from the Development Inbox) just as they are today.

Withdrawal Requests

Receive request to withdraw an application	
Learning activities	1. Receive and approval a request to withdraw an application
Trainer Notes and points to cover	<ul style="list-style-type: none"> - In PlanBuild an applicant can use a form titled 'Withdrawal Request' to withdraw an application that has been submitted to TasWater and is in the 'submitted' or 'assessment' status. - An applicant must provide a reason for referral with their request. - The applicant must select from a list of users to receive the request. The user currently processing the form they are applying to cancel will be shown as (assignee). - Upon submission, the selected user will have a task to review the withdrawal request. The user can make comment on this form and either Confirm the withdrawal or reject the application for withdrawal. - If confirmed, the withdraw request will be completed and associated with the relevant permit/ certificate. The status of the relevant certificate/permit application will be changed to 'withdrawn', the reason for referral will be displayed on the 'withdrawn' status.
Questions that may arise	<p>Q: What if an applicant requests to withdraw their application outside of PlanBuild (email/phone call etc).</p> <p>A: The TasWater user can either direct the user to use PlanBuild or submit the withdrawal request on the applicants behalf.</p>



PlanBuild
TASMANIA

Planning Application Referral Notice Administration Training Package

Planning Application Referral Notice Training Course

Course Title – Planning Application Referrals Training Course	
Time	4 hours (One day)
Audience	Administration Support Officers
Requirements/resources	<ul style="list-style-type: none"> - Example Design Plans, Concept Servicing Plans - Example Certificate of Title, SOE
Pre-requisite courses	<ol style="list-style-type: none"> 1. TasWater Business Education Program 2. Getting Started with PlanBuild Application Services
Learning Activities	<ol style="list-style-type: none"> 1. Administer a planning application referral <ol style="list-style-type: none"> a) that requires a request for further information b) that requires no action to be deemed valid c) that requires an internal referral 2. Administer a Consent to register a legal document – Final plan and schedule of easement <ol style="list-style-type: none"> d) that requires a request for further information e) that requires no action to be deemed valid 3. Notice of Appeal and outcome - Planning
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"> - Receive a Planning Application Referral - Review a submitted Planning Application Referral - View, download & edit documents - Request further information & internal referrals - Find & acknowledge a referral response - Check referral application is complete & task is generated for allocation - Receive and complete tasks - Find & view a completed Planning Permit - Manage and view Appeals

Administer & Validate Planning Referral or Consent

Validate a planning referral or Consent	
Learning activities	<ol style="list-style-type: none"> 1 Validate a planning application referral or consent <ol style="list-style-type: none"> 1.1 that requires a RFI 1.2 where no further action is required to be deemed valid
Trainer Notes and points to cover	<ul style="list-style-type: none"> - For an interim period TasWater support officers will ensure planning application referrals and CRLD are valid and will note "valid referral" - These will then be assigned to the relevant Assessment manager for task allocation to assessment officers. - Applications will be referred by the relevant permit authority. - Support Officers will be able to view and validate the task either by viewing the organisation task and or via the task search option. - Users with the assessing officer role profile will also be able to view and validate if required. - Referral Authorities will set the assessment timeframes which is in line with the regulated time frames as per the Water and Sewerage Industry Act - 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 by the referral authority - Support 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
Questions that may arise	<p>Q. Why is the referral workflow process different to TasWater applications workflow process?</p> <p>A: The workflow process is different due to the fact that the referral authority issues the RFI and or Permits on behalf of TasWater. This is allowing for them to ensure that all TasWater requirements / conditions are included.</p>



PlanBuild
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Planning Application Referral Notice Assessment Training Package

Planning Application Referral Notice Assessment Training Course

Course Title – Planning Application Referral Notice Assessment Training Course	
Time	1-2 hours
Audience	Assessment Officers
Requirements/resources	<ul style="list-style-type: none"> - Submitted applications awaiting assessment in PlanBuild with supporting documents including: - Example Design / Concept Plans - Example Certificate of Title, SOE
Pre-requisite courses	<ul style="list-style-type: none"> - TasWater Business Education Program - Getting Started with PlanBuild Application Services
Learning Activities	<ol style="list-style-type: none"> 1. Review and ensure planning application has everything to proceed <ol style="list-style-type: none"> a) where no further action is required b) that requires a RFI 2. Assess a planning referral application that needs an internal Trade Waste referral 3. Issue a SPAN with conditions and internal referral / Trade waste conditions – stamp and sign 4. Amend a previously issued Permit
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"> - Review the Planning Application Referral - View, download & edit documents - Request further information and internal/external referrals - Manage the clock - Complete a SPAN assessment in PlanBuild

Course Title – Planning Application Referral Notice Assessment Training Course

- Stamp and sign documents
- Add conditions
- Request an extension of time
- Approve & issue a SPAN
- Find & view a completed Planning Permit
- Amend a SPAN

Issue a Submission to Planning Authority Notice (SPAN)

Issue a SPAN	
Learning activities	<ol style="list-style-type: none"> 1. Issue a SPAN approval with conditions and internal referral conditions 2. Issue a SPAN RFI
Trainer Notes and points to cover	<ul style="list-style-type: none"> - In PlanBuild a Permit Authority can refer an application to TasWater from the planning application assessment screen. - The Permit Authority will select documents to provide along with the referral. Planning application data will also be provided with the referral. - The Permit Authority referral assessment timeframes will be set as per the Water and Sewerage Industry Act for Submission to Planning Authority Notice (SPAN) by the authority. - Once sent by the Permit Authority, the referral will become available to assessing officers via the Organisation Tasks, section of their dashboard. A referral can also be found by searching tasks. - The assessment officer can claim the task and perform an assessment, this could include an internal referral. - The referral regulated time frames per the Water and Sewerage Industry Act for Submission to Planning Authority Notice (SPAN) - The assessment screen contains a module that can be used to either apply conditions, in the case of issuing a SPAN, or RFI items, in the case of a request for additional information being sent to the permit authority. - The assessment officer will have the option of either approving the referral, which will result in a SPAN PDF output, or requesting further information from permit authority, which will result in an RFI PDF output. - Where an RFI is sent, the Permit Authority Planner will include the RFI items on a request to the applicant. Upon response from the applicant, the Planner will commence another TasWater referral, including any new information sought in response to the RFI. <p>Notifying others of the SPAN</p> <ul style="list-style-type: none"> - PlanBuild has been configured to generate auto notifications when certain actions are taken, this will only occur on confirmation of a permit authority 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).

Issue a SPAN

- PlanBuild will send 'standard' auto-notifications. If TasWater wants to add further information for the applicant, they can upload a template document that outlines further detail (if the details are not fully covered by the permit itself).

Previewing the SPAN

- Reminder to users that they can preview what the SPAN will look like for the applicant using the 'Preview Complete' checkbox before they Confirm sending to the permit authority.

Questions that may arise

Q:

A:

Consent to Register a Legal Document

Subdivision	
Learning activities	<ol style="list-style-type: none"> 1. Issue Consent to register a legal document 2. Issue a CRLD RFI
Trainer Notes and points to cover	<p>Issuing the CRLD</p> <ul style="list-style-type: none"> - In PlanBuild a Permit Authority can refer an application to TasWater from the planning application assessment screen. - The Permit Authority will select documents to provide along with the referral. Planning application data will also be provided with the referral. - The Permit Authority referral assessment timeframes will be set as per the Water and Sewerage Industry Act for the Consent to register a Legal Document (CRLD) by the authority. - Once sent by the Permit Authority, the referral will become available to assessing officers via the Organisation Tasks, section of their dashboard. A referral can also be found by searching tasks. - The assessment officer can claim the task and perform an assessment, this could include an internal referral. - The assessment screen contains a module that can be used to either apply conditions, in the case of issuing a CRLD, or RFI items, in the case of a request for additional information being sent to the permit authority. - The assessment officer will have the option of either approving the referral, which will result in a CRLD PDF output, or requesting further information from permit authority, which will result in an RFI PDF output. - Where an RFI is sent, the Permit Authority Planner will include the RFI items on a request to the applicant. Upon response from the applicant, the Planner will commence another TasWater referral, including any new information sought in response to the RFI. <p>Notifying others of the CRLD</p> <ul style="list-style-type: none"> - PlanBuild has been configured to generate auto notifications when certain actions are taken, this will only occur on confirmation of a permit authority approving a 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).

Subdivision

	<ul style="list-style-type: none">- PlanBuild will send 'standard' auto-notifications. If TasWater wants to add further information for the applicant, they can upload a template document that outlines further detail (if the details are not fully covered by the permit itself). <p>Previewing the Consent</p> <ul style="list-style-type: none">- Reminder to users that they can preview what the Consent will look like for the applicant using the 'Preview Complete' checkbox before they Confirm sending to the permit authority.
Questions that may arise	Q. A:

Amendments

Amendments (Minor)	
Learning activities	1. Amend a previously issued Permit
Trainer Notes and points to cover	<ul style="list-style-type: none"> - This form will be used to make an amendment to a Planning Permit that has already been issued by the permit authority. - The formal amendment process request will be processed by the permit authority. - This form can be created by the permit authority user from the Sub Project screen. - The form will be automatically approved upon submission.
Questions that may arise	<p>Q: What if a Permit is refused in error?</p> <p>A: The administrative amendment form can be used in this instance to issue a new approval.</p>

Administrative Amendments

Administrative Amendments	
Learning activities	1. Administrative amendments of a permit
Trainer Notes and points to cover	<ul style="list-style-type: none"> - This form is used to make an amendment to a certificate or permit or notice that has already been issued by TasWater. - There is a separate form/process for the formal amendment process, this administrative amendment form should only be used for small administrative corrections (e.g. keying errors). - This form can be created by a user from the Sub Project screen. - The form will be automatically approved upon submission.
Questions that may arise	<p>Q: Who will be notified when I mark as complete?</p> <p>A: The defined notification are set as and are as per the original notifications.</p>

Appeals

Notice of Appeal	
Learning activities	1. Review Notice of Appeal and Outcome
Trainer Notes and points to cover	<ul style="list-style-type: none"> - TasWater will continue to administer all correspondence as they do today. They will however have the visibility that a Planning Permit is under appeal as this will be noted by the relevant permit authority - The form will be created by a authority user from the Sub Project screen. - TasWater will issue amended permits via PlanBuild once an appeal out has been determined.
Questions that may arise	<p>Q. Do I need to add all appeal documentation to PlanBuild?</p> <p>A: TasWater will continue to administer all correspondence as they do today. They will however have the visibility that a Planning Permit is under appeal as this will be noted by the relevant permit authority.</p> <p>Q. How will I issue an amended Planning Permit falling out of an appeal?</p> <p>A: The relevant permit authority can request the amendment via PlanBuild if applicable</p>



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TasWater Application Administration Training Package

TasWater Application Administration Training Course

Course Title – TasWater Application Administration Training Course	
Time	4 Hours (Half day)
Audience	Administration Support Officers
Requirements/resources	<ul style="list-style-type: none"> - Example House Plans - Example Certificate of Title, SOE
Pre-requisite courses	<ul style="list-style-type: none"> - TasWater Business Education Program - Getting Started with PlanBuild Application Services
Learning Activities	<ol style="list-style-type: none"> 1. Find & acknowledge a TasWater Application 2. Administer a TasWater Application that is for a Certificate for Certifiable Work (CCW) that requires a RFI 3. Create an internal referral to Trade waste
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"> - Receive a TasWater application - Review a submitted application - View, download & edit documents - Request further information & internal referrals - Find & acknowledge a referral response - Request & accept a payment - Check application is complete & generate task to Assessment officer for assessment - Receive & complete tasks - Find & view a completed certificate

Certificate for Certifiable Work - CCW

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Administer a TasWater Application that is for a CCW and requires further information to deem valid.
Trainer Notes and points to cover	<ul style="list-style-type: none"> - CCW Applications will be submitted by applicants and will be available to be verified by either viewing them within the organisation task list or via the search task function. – Action name will show as having “Acknowledge” - An internal referral can be completed as the same time as the application is deem valid. - 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
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your “My Task List” or via the search field “tasks”. If you are on leave other users can search for those tasks via the search field.</p> <p>Q. How do I see a request for an amendment due to changes on site?</p> <p>A: Once TasWater has assessed a application and issued the relevant certificate/s there may be amendments made to the plans/design, these requests will be represented by new tasks within PlanBuild and will be shown as tasks “Application for Amended” with the relevant for name.</p> <p>Q. Can applicants request to withdraw their CCW or other applications?</p> <p>A: Applicants can request to withdraw their application, via the withdrawal request form. If a certificate or permit has been issued and fees and charges have been paid or requested to be paid then as per the current process, no refund would apply.</p>

Certificate for Water and Sewerage Compliance (COWSC)

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Administer a TasWater Application that is for a COWSC and requires further information to deem valid.
Trainer Notes and points to cover	<ul style="list-style-type: none"> - COWSC Applications will be submitted by applicants and will be available to be verified by either viewing them within the organisation task list or via the search task function. – Action name will show as having “Acknowledge” - An internal referral can be completed as the same time as the application is deem valid. - 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.
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your “My Task List” or via the search field “tasks”. If you are on leave other users can search for those tasks via the search field.</p>

Engineering Design Approval (EDA)

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Administer a TasWater Application that is for a EDA and requires further information to deem valid.
Trainer Notes and points to cover	<ul style="list-style-type: none"> - EDA Applications will be submitted by applicants and will be available to be verified by either viewing them within the organisation task list or via the search task function. – Action name will show as having “Acknowledge” - An internal referral can be completed as the same time as the application is deem valid. - 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.
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your “My Task List” or via the search field “tasks”. If you are on leave other users can search for those tasks via the search field.</p>

Permit to Construct (PTC)

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Administer a TasWater Application that is for a PTC and requires further information to deem valid.
Trainer Notes and points to cover	<ul style="list-style-type: none"> - PTC Applications will be submitted by applicants and will be available to be verified by either viewing them within the organisation task list or via the search task function. – Action name will show as having “Acknowledge” - An internal referral can be completed as the same time as the application is deem valid. - 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.
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your “My Task List” or via the search field “tasks”. If you are on leave other users can search for those tasks via the search field.</p>



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TasWater Application Assessment
Training Package

TasWater Application Assessment Training Course

Course Title – TasWater Application Assessment Training Course	
Time	8 Hours (1 Day)
Audience	<ul style="list-style-type: none"> - Assessment Officer - Compliance Officer
Requirements/resources	<ul style="list-style-type: none"> - Example House Plans - Example Certificate of Title, SOE
Pre-requisite courses	<ul style="list-style-type: none"> - TasWater Business Education Program - Getting Started with PlanBuild Application Services
Learning Activities	<ul style="list-style-type: none"> - Assess a Application that is for a CCW & requires a RFI - Assess a Application that is a CCW & requires Trade Waste review - Issue a CCW with conditions & documentation and internal conditions - Amend a previously issued Certificate - Create a request to pay (invoice)
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> - Receive a submitted Application - Review the Application - View, download & edit documents - Request further information & internal/external referrals - Request & accept a payment or additional payment - Manage clocks - Complete a Application assessment in PlanBuild - Stamp & sign documents - Add conditions - Approve & issue a certificate - Reject or refuse an application - Find & view a completed Certificate - Amend a Certificate

Course Title – TasWater Application Assessment Training Course

- Issue a Certificate of Water & Sewerage Compliance - COWSC

Assess Certificate for Certifiable Work - CCW

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Assess an Application that is for a CCW & requires a RFI
Trainer Notes and points to cover	<ul style="list-style-type: none"> - Applications will be submitted by applicants and will be initially validated by the support team. - 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. - 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. - Allocation of tasks will still occur by the Assessment Manager and will be aligned to skills sets and workload. <p>If internal referral required, (refer to internal referral course)</p>
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your “My Task List” or via the search field “tasks”. If you are on leave other users can search for those tasks via the search field.:</p> <p>Q. Can I issue a 56W Consent at the same time as a CCW?</p> <p>A: Applicants will be required to submit an application for a CCW and a 56W Consent. These will be shown as separate tasks however, they can still be issued at the same time.</p> <p>Q. What happens if I need to amend a certificate or permit that has been issued due to a keying error?</p> <p>A: All relevant PlanBuild users will have the ability to request / submit an administration amendment form.</p> <p>Q. Why is the amend a certificate or permit that has been issued due to a keying error so different to any current process?</p> <p>A: To allow for greater document / version control management within PlanBuild all amended documents / changes will be captured an old versions will be deemed expired.</p>

Assess Certificate for Water and Sewerage Compliance (COWSC)

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Assess an Application that is for a CCW & requires a RFI
Trainer Notes and points to cover	<ul style="list-style-type: none"> - Applications will be submitted by applicants and will be initially validated by the support team. - 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. - 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. - Allocation of tasks will still occur by the Compliance Manager and will be aligned to skills sets and workload. <p>If internal referral required, (refer to internal referral course)</p>
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your "My Task List" or via the search field "tasks". If you are on leave other users can search for those tasks via the search field.</p>

Assess Engineering Design Approval (EDA)

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Assess an Application that is for a EDA & requires a RFI -
Trainer Notes and points to cover	<ul style="list-style-type: none"> - Applications will be submitted by applicants and will be initially assigned to users with an Admin Role - 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 - 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 - Allocation of tasks will still occur by the Assessment Manager and will be aligned to skills sets and workload. <p>If internal referral required, (refer to internal referral course)</p>
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your “My Task List” or via the search field “tasks”. If you are on leave other users can search for those tasks via the search field.</p>

Assess Permit to Construct (PTC)

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Assess an Application that is for a PTC & requires a RFI -
Trainer Notes and points to cover	<ul style="list-style-type: none"> - Applications will be submitted by applicants and will be initially assigned to users with an Admin Role - 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 - 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. - Allocation of tasks will still occur by the Assessment Manager and will be aligned to skills sets and workload. <p>If internal referral required, (refer to internal referral course)</p>
Questions that may arise	<p>Q. How will I know that an applicant has responded to my request for further information?</p> <p>A: These tasks will be visible within your “My Task List” or via the search field “tasks”. If you are on leave other users can search for those tasks via the search field.</p>

Create a Request to Pay (Invoice)

TasWater Applications	
Learning activities	<ul style="list-style-type: none"> - Creating a request to pay (invoice)
Trainer Notes and points to cover	<ul style="list-style-type: none"> - Once an application has been received, a request for payment can be raised - An application can be progressed to an assessing officer, where they are also able to raise a request for payment. - TasWater users can select the relevant recipient and add in the details/codes of the relevant line item/s to be included on the request. Each line item can be amended as required. - Multiple line items can be added to the one request - Any details that need to be included on the invoice to the applicant can be added when generating the request for payment. - The request for payment will be generated and progressed through to the applicant as a task action. - The applicant can make a payment using one of the available payment methods. - PlanBuild is not a debt management program and outstanding request to pay will not age.
Questions that may arise	<p>Q. What happens once I confirm the request for payment?</p> <p>A: Once a request has been raised a notification will be sent to the applicant and a new task will be added to their task list.</p> <p>Q. How will I know that the invoice has been paid?</p> <p>A: Once the system has processed the payment a notification will be sent to the organisation and a new task will be added</p>



PlanBuild
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Internal Training Package

Internal Referral Training Course

Course Title – Internal Referral Training Course	
Time	1 hour
Audience	<ul style="list-style-type: none"> - Internal Referral
Pre-requisite courses	<ul style="list-style-type: none"> - TasWater Business Education Program - Getting Started with PlanBuild Application Services
Learning Activities	<ol style="list-style-type: none"> 1. Assess an application that has been internally referred <ol style="list-style-type: none"> 1.1 Generate an RFI request 1.2 Add conditions to RFI
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> - Assess a request - Request further information - Add relevant conditions - Upload documents - Add notes - Respond to internal referral

Internal Referral – Assess Application

Assess an application and raise RFI	
Learning activities	<ul style="list-style-type: none"> - Refer an application to another user within your organisation - Review an application that has been referred, upload a document and add conditions. - As the officer, review and acknowledge the referral response, review uploaded documents and add relevant conditions to the assessment conditions
Trainer Notes and points to cover	<ul style="list-style-type: none"> - In PlanBuild an officer can refer an application to another user within their organisation. - When drafting the referral a user can set a timeframe in which the recipient should respond to the referral. This will inform the due-date for the referral task. - Once referred, the recipient user will receive a task and notification prompting review of the referral. - There is provision for the user to provide context, info and/or instructions to the referral recipient will the referral. For more information, the referral recipient should navigate back to the assessment screen of the relevant application to view application information and documentation. - The party that responds to an internal referral can add conditions to the response as well as add additional documents. - Once the referral recipient has responded to the referral, the officer (or person that sent the referral) will receive a task and notification prompting review of the referral response. The officer will acknowledge the referral response. Upon acknowledgement, any conditions or documents added as part of the referral response can be added to the Assessment screen on the relevant application.
Questions that may arise	<p>Q. Why are Internal referral to Asset Strategy being completed outside of PlanBuild?</p> <p>A: In time, and once the new structure of SIS is bedded down, they will look to changes to the process, as multiple departments will be involved in such referrals and they will integrate their processes, once established.</p> <p>In the interim, the assessment officer's will be responsible for uploading relevant information into PlanBuild and also uploading to CM, but not using Resource, for those applications in PlanBuild.</p>



PlanBuild
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Organisation System Administrators Training Package

Organisation System Administrators Training Course

Course Title – Finance Training Course	
Time	1 hour
Audience	- Organisation System Administrators
Requirements/resources	- Users will need the 'Organisation System Admin' role in PlanBuild.
Pre-requisite courses	- UO Business Education Program - Getting Started with PlanBuild Application Services
Learning Activities	<ol style="list-style-type: none"> 2. Edit organisation details 3. Update logo 4. Update contact information 5. Edit fee rates 6. Invite or retire users to the organisation 7. Edit user permissions 8. Add and update electronic signature 9. Maintain condition and RFI library
Learning Outcomes	<p>How to:</p> <ul style="list-style-type: none"> - Ability to complete the tasks assigned to the PlanBuild Tasmania Organisation System Administrator role.

Edit Organisation Details

Learning activities	<ol style="list-style-type: none">10. Edit organisation details11. Update logo12. Update contact information
Trainer Notes and points to cover	<ul style="list-style-type: none">- The contact details etc. can be edited by any user with the 'Organisation System Admin' role.- This role should only be given to a limited number of users as they have control to change financial details.- 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.- There is a tab for 'General', 'Images' (for logo) and 'Contact' which can all be updated as required.
Questions that may arise	

Edit Fee Rates

Edit Fee Rates	
Learning activities	1. Edit fee rates
Trainer Notes and points to cover	<ul style="list-style-type: none"> - Fee rates can be edited by any user with the 'Organisation System Admin' role. - 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. - 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. - To create a new fee rate schedule, select 'Add Fee Rate Group'. - The Organisation System Admin has the ability to edit the base and unit rates, add ledger codes and nominate if GST applies.
Questions that may arise	<p>Q: Can fee rates be adjusted during the financial year?</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"> 1. Invite or retire users to the organisation 2. Edit user permissions 3. Add and update electronic signature
Trainer Notes and points to cover	<p>Invite / retire users</p> <ul style="list-style-type: none"> - Users can be invited and managed by any user with the 'Organisation System Admin' role. - 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. - The 'Active Members' section shows any users currently in the organisation, you can retire a user by selecting the 'unlink' action button. - 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). - 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. - 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. <p>User permissions</p> <ul style="list-style-type: none"> - 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). - Users can be assigned 'Departments' which will determine the sub project types will appear in the 'Organisation Tasks' section, for TasWater this will be TasWater Development Compliance – Compliance officer will only see related tasks. TasWater Development Services for Assessment Officers. - All users in a TasWater will be required to have the standard 'TasWater' department, if they do not hold this role they will not see any tasks within the organisation. Anyone with this 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 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

- This role will be assigned to managers to allow them to view, assign and re-assign tasks across all staff in their Department.

	<p>Signatory Delegate</p> <ul style="list-style-type: none"> - 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. <p>Organisation System Admin</p> <ul style="list-style-type: none"> - This role will be assigned to internal system administrators to access the organisation details screen to manage information, users, permissions and libraries. <p>Organisation Reporting</p> <ul style="list-style-type: none"> - 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.
Questions that may arise	

Maintain Organisation Specific Libraries

Maintain Organisation Specific Libraries	
Learning activities	1. Maintain condition and RFI library
Trainer Notes and points to cover	<p>Condition Library</p> <ul style="list-style-type: none"> - The condition library can be managed from the organisation admin screen. - To add a new item to the library, select the 'Add Library Condition' button. - Once added this will be available for users in the Organisation to select when adding conditions to an output. - To edit or remove an existing condition, select the relevant condition and edit/remove accordingly. <p>RFI Reason Library</p> <ul style="list-style-type: none"> - To add a new item to the library, select the 'Add Library Referral' button. - Once added this will be available for users in the Organisation to select when creating a referral (internal and external). - On the referral creation screen 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.
Questions that may arise	<p>Q: Can an individual organisation user update a library item?</p> <p>A: No, the organisation system admin role is required to edit the library. However, an assessor 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">- UO Business Education Program- Getting Started with PlanBuild Application Services
Learning Activities	<ol style="list-style-type: none">1. Understand the 'Organisation Reporting' role2. Generate a report from a Data Source3. Generate a CSV from the application search functions
Learning Outcomes	How to: <ul style="list-style-type: none">- Generate reports using PlanBuild Tasmania

Reporting in PlanBuild Tasmania

Reporting in PlanBuild Tasmania	
Learning activities	<ol style="list-style-type: none"> 1. Understand the 'Organisation Reporting' role 2. Generate a report from a Data Source 3. Generate a CSV from the application search functions
Trainer Notes and points to cover	<p>Organisation Reporting</p> <ul style="list-style-type: none"> - This role will give users the ability to access the reporting screen to generate pre-built reports. - Once a user is given this role the 'Reporting' option will be available in the left-hand-side banner menu. - From here a user can select from a list of pre-set data sources for their organisation. - Organisations will not be able to create new data sources themselves, but these can be developed in consultation with the PlanBuild team/vendor. <p>Application Reporting</p> <ul style="list-style-type: none"> - Ad hock/simple reporting can be done by any user with the 'Permit Authority' department by using the search screens and exporting to CSV. - 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 50,000) and filtered in Microsoft Excel (or similar).
Questions that may arise	<p>Q: Can organisations create their own data sources for reporting?</p> <p>A: No, these can only be created by the PlanBuild vendor in consultation with the PlanBuild Support Team.</p>