



**PlanBuild**  
TASMANIA

# TasWater User Guide: Assessing an Application

Version 1

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## Find the Task

The screenshot displays the PlanBuild dashboard interface. At the top, there is a 'Home' header and a '+ Create project' button. Below this is a 'Task Filter' section with a search bar and checkboxes for 'Has Outstanding RFI' and 'Has Outstanding Referral'. The main content is divided into two task lists:

- My Task List:** Shows 1 to 15 entries. It includes a table with columns: Created, Due, Remaining, Owners, Applicants, Address, Sub Project, Action, RFI, and Referred. Two tasks are visible:
 

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred
22/08/2023	-	-	Bob Builder	-	7000	TAS	Submit Adjust Assessment Timeframe form Adjust Assessment Timeframe (TasWater)		
24/08/2023	-	29 days	Owner User	Owner User	171	TasWater	Acknowledge submitted Application for Certificate(s) for Certifiable Work form Application for Certificate(s) for Certifiable Work (TasWater)	✓	✓
- Organisation Tasks:** Shows 1 to 10 of 23 entries. It includes a table with columns: Created, Due, Remaining, Owners, Applicants, Address, Sub Project, Action, RFI, Referred, and Assignee. Three tasks are visible:
 

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred	Assignee
21/08/2023	-	26 days	Owner User	Owner User	3		Assess Amended Certificate(s) for Certifiable Work form Amended Certificate(s) for Certifiable Work (TasWater)	3	✓	
21/08/2023	31/08/2023	47 days overdue	Owner User	Owner User	3		Assess Certificate for SEW Consent form Certificate for SEW Consent (TasWater)			
22/08/2023	25/08/2023	54 days overdue	Bob Builder	Bob Builder	5	7	Assess Certificate for SEW Consent form Certificate for SEW Consent (TasWater)			

Once an application is progressed to 'Assessment' status, it will be available on the PlanBuild Dashboard for users with the 'Assessing Officer' role in the portal to claim or assign, current work allocation process can be applied.

The following tips might help you find a task:

1. Any unassigned tasks that require an assessment will appear under 'Organisation Tasks'. Any tasks a user has claimed or been assigned will appear under 'My Task List'.
2. You can select any of the column headings to rearrange the task list by different criteria, such as Created Date, Due Date, Address, etc.
3. See the 'Action' column to check the type of application, and the action required. At this stage, the action item should be listed as 'Assess Application form'.
4. Select the 'pop out' button to open the task in a new tab (so that you can view the referral and other details you need from dashboard). You can click on the 'cycle' button to view the referral history (including payment request) of the application.

5. A tick under the RFI column indicates the application has a current RFI, which does not stop the application from being progressed to Assessment stage.

6. You can search for a task directly in the search bar by Address, Reference Number, Project, Sub Project or Application Name, Owner or Applicant details. This will filter both the 'My Task List' and 'Organisation Tasks'.



## Adjust Assessment Timeframe

### Available Applications/Forms

These forms are available for you to create. If a form is greyed out, this means either that it cannot be submitted at this stage in the project, or that you do not have the correct permissions to create it. Some forms may only be available to another party involved with your sub project.

#### Other Applications


Application for Amended Engineering Design Approval   Application for Amended Permit to Construct   Application for Engineering Design Approval   Application for Permit to Construct   Certificate of Practical Completion   **Adjust Assessment Timeframe**   Withdrawal Request



#### Certifiable Work

Application for Amended Certificate(s) for Certifiable Work   Application for S6W Consent   Application for Amended S6W Consent   Application for Amended Certificate(s) of Water and Sewerage Compliance   Application for Certificate(s) of Water and Sewerage Compliance  
Application for Certificate(s) for Certifiable Work

### Submitted or Active Applications/Forms

These are the forms that have been generated for this Sub Project. This list shows the status of these forms.

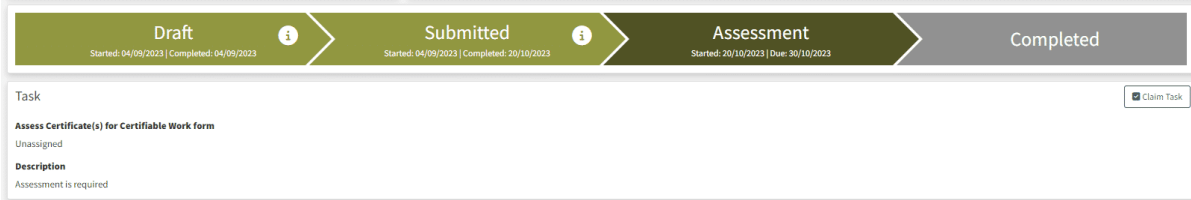
 Certificate(s) for Certifiable Work  
TASWACW-HOB-2023-AS3R 4 related

 **Assessment**  
Submitted: 20/10/2023 

During assessment, an Assessment Officer (a user who has the 'Assessing Officer' role in the portal) can adjust the timeframe via 'Adjust Assessment Timeframe'.

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

## Claim Task



The image shows a task progress bar with four stages: Draft, Submitted, Assessment, and Completed. The 'Assessment' stage is currently active. Below the bar, the task details are shown: 'Assess Certificate(s) for Certifiable Work form', 'Unassigned', and 'Description: Assessment is required'. A 'Claim Task' button is visible in the top right corner of the task details panel.

Stage	Started	Completed
Draft	04/09/2023	04/09/2023
Submitted	04/09/2023	20/10/2023
Assessment	20/10/2023	30/10/2023
Completed		

**Task**

**Assess Certificate(s) for Certifiable Work form**

Unassigned

**Description**

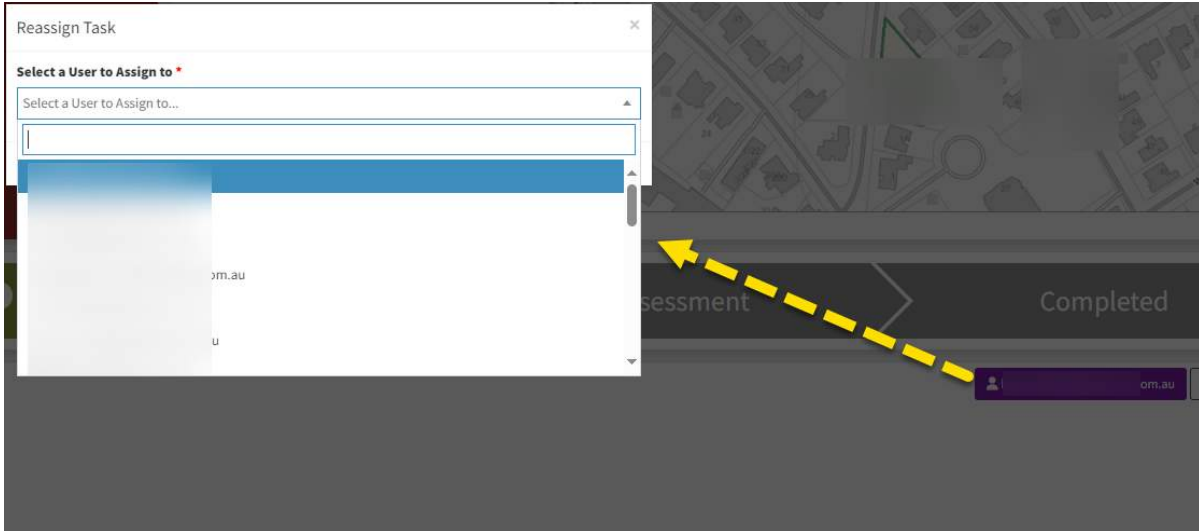
Assessment is required

[Claim Task](#)

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

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

## Reassign Task



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

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

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

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

## View Payment

The screenshot shows a 'Draft' application status page. The top bar indicates 'Draft' with a progress indicator and dates 'Started: 24/08/2023 | Completed: 24/08/2023'. Below this, the task is 'Acknowledge submitted Application for Certificate(s) for Certifiable Work form'. A 'Go to Payments' button is highlighted with a yellow box and an arrow pointing to the 'Payments' page below.

The 'Payments' page features a search bar with the text 'TASWACCW-SOR-2023-YE1Y'. Below the search bar are filters for 'Date Paid' and 'Date Issued'. A table of payments is displayed with the following data:

Issued Date	Application Number	Name	Invoice Number	Payee Name	Property Address	Total	Total GST	Receipt Number	Paid on Date
24/08/2023	TASWACCW-SOR-2023-YE1Y	TASWAA-SOR-2023-98MH: Invoice	25975990		BAY RD MIDWAY POINT TAS 7171	\$431.88	\$0.00		

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

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

## Notes

### Notes

This section can be used to communicate with other users within your organisation. You do not need to claim this task to use this functionality.

Use the tabs to select:

**Notes:** You can make a note against this application or assessment that is viewable by other users within your organisation on this screen and the notes summary on the sub-project screen.

**Attachments:** You can upload an attachment against this application or assessment that can be downloaded by another user within your organisation.

**Communications:** You can communicate with other users within your organisation. Here you can select a user or multiple users to receive your communication, enter the content of the communication and select a due date for action. The recipient/s will receive the communications via their PlanBuild dashboard.

Notes Attachments Communications

This section is for storing internal assessment notes, these will not form part of a system output.

Showing 1 to 2 of 2 entries Show 10 Previous 1 Next

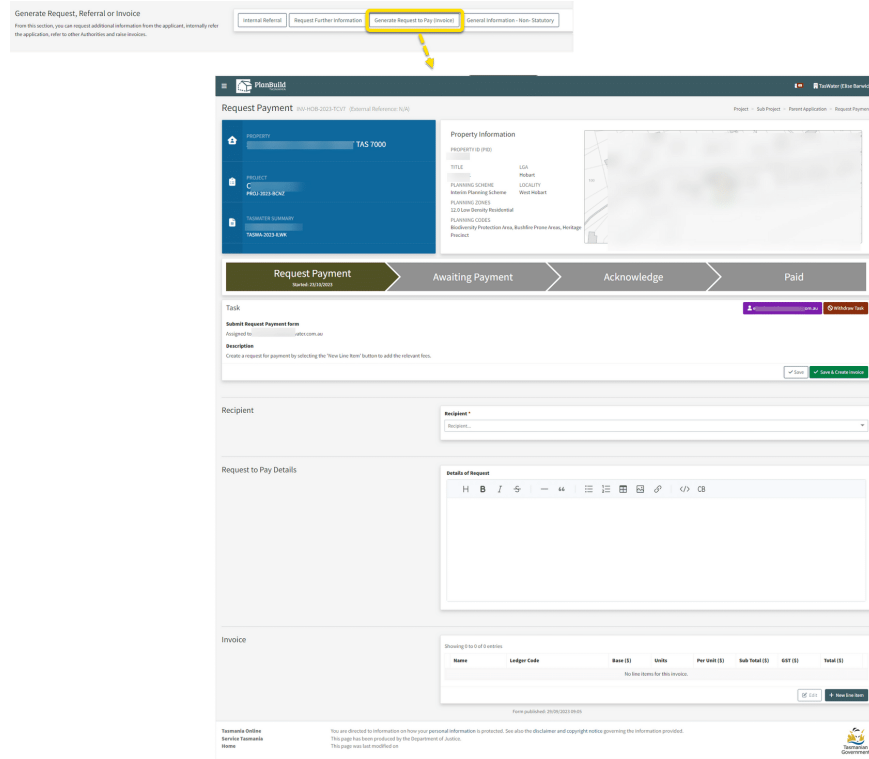
Created On	Created By	Content	
16/04/2024	[Redacted]	[Redacted]	
16/04/2024	[Redacted]	Valid Application. Payment required.	

[+ Add Note](#)

The 'Notes' section under the task description box is for internal use and the notes will not be visible to the applicants or anyone outside of the organisation. It can be used for internal communication, such as noting any communications with the applicant outside of PlanBuild Tasmania (e.g. emails, phone calls, etc.), or to provide any additional information to a team member who is taking over the task.



## Raise an Invoice



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

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

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

The screenshot shows a modal window titled "Add a new invoice line item" with a close button (X) in the top right corner. The form contains the following sections:

- Fee \***: A dropdown menu with "Fee..." and a "Custom Fee" checkbox.
- Description**: A text input field with "Description..." placeholder.
- Ledger Code**: A text input field with "Ledger Code..." placeholder.
- Base Total (\$)**: A text input field with "Base Total (\$)" placeholder.
- Units**: A text input field with "Units..." placeholder.
- Rate per Unit (\$)**: A text input field with "Rate per Unit (\$)" placeholder.
- GST (\$)**: A text input field with "0.00" value.
- Calculated Total (\$)**: A text input field with "0.00" value.

At the bottom right, there are two buttons: a green "Save Line Item" button with a thumbs-up icon and a white "Cancel" button with an X icon.

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

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

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

## Payment method - Office Use Only (applicable once upfront payments are in place)

For upfront payments, applicants can pay via:

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

Confirm Payment

Payment Summary

Fees are required to progress the form...

Fee	Sub Total	GST	Total
Tasmanian Heritage Listed Properties	\$1.00	\$0.00	\$1.00
		\$0.00	\$1.00

Payment Method

Credit Card

BPAY

Office Use Only

Please enter the name to be shown on the receipt

Name \*

Owner User

Address \*

123 Test Street, Hobart, Tasmania, Australia, 7000

Test

Card Number

Security Code

Name on Card

Expiration

MM / YY

Confirm & Pay Cancel

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

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

## Review application details and perform assessments

[Go to Payments](#) Acknowledge submitted Application for Certificate(s) for Certifiable Work form Save Save & Confirm

**Details of previous lodgements**

**Previous Lodgement**

TasWater reference no.

Council reference no.

**Type of work**

If the work includes both Building and Plumbing please check both boxes.

**The type of work to be undertaken includes:**

- Building
- Plumbing

**Description of work**

**Description of proposed use or development\***

Subdivision and New Dwelling

**Constructing near TasWater Infrastructure**

**Will you be constructing within 2m of TasWater infrastructure?\***

Yes (S6W)

No

**Classification of Work**

**Please select a classification for your work\***

Medium Works

**Certificate of Title**

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

## Available Documents and Assessment Documents

Acknowledge submitted Minor Amendment to Planning Permit form Start assessment?  
 Save  Start Assessment  Reject Application

**Available Documents**

This section shows all the documents available as part of this Project.

Information uploaded as part of a Request for Further Information or Referral will be shown here.

Documents listed in this section are not available/visible to a Request for Information or Referral. **Documents listed in this section will not be referenced in the approval.**

To make these documents available to Referrals and Requests as well as the approved output, use the checkboxes to select relevant documents and click the 'Add Selected' button. These documents will be moved to the 'Assessment Documents' section.

**Search** **Document Type**

Search document name, prepared by, reference or form Filter by document type  Approved

Showing 0 to 0 of 0 entries Show 10

Version	Document Type	Description	Filename (size)	Uploaded Prepared by	Form
No Documents Found.					

**Assessment Documents**

These documents and certificates have been submitted with this planning application OR have been added by Council as part of the review/assessment process.

All documents within this section are available/visible to all Referrals and Requests generated as part of this assessment.

Showing 1 to 7 of 7 entries

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By	
01	06/10/2023	06/10/2023	Property Title Document	0 FOLIO PLAN 16445_0_1.pdf	0 FOLIO PLAN 16445_0_1.pdf	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
01	06/10/2023	06/10/2023	Property Title Document	1 SCHEDULE OF EASEMENTS 16445_0_1.pdf	1 SCHEDULE OF EASEMENTS 16445_0_1.pdf	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
01	06/10/2023	06/10/2023	Property Title Document	0 PLAN-RELATED DOCUMENTS 16445_0_1.pdf	0 PLAN-RELATED DOCUMENTS 16445_0_1.pdf	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
01	06/10/2023	06/10/2023	Property Title Document	0 Folio Text 16445_0_1.pdf	0 Folio Text 16445_0_1.pdf	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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

Download Form Assess Amended Planning Application form

Is the assessment complete?  
 Save  Issue Determination  Refuse Application

### Available Documents

This section shows all the documents available as part of this Project.  
 Information uploaded as part of a Request for Further Information or Referral will be shown here.  
 Documents listed in this section are not available/visible to a Request for Information or Referral. **Documents listed in this section will not be referenced in the approval.**  
 To make these documents available to Referrals and Requests as well as the approved output, use the checkboxes to select relevant documents and click the 'Add Selected' button. These documents will be moved to the 'Assessment Documents' section.

**Search** **Document Type**

Search document name, prepared by, reference or form Filter by document type  Approved

Showing 1 to 3 of 3 entries Show 10 Previous 1 Next

Version	Document Type	Description	Filename (size)	Uploaded Prepared by	Form
<input type="checkbox"/>	1	Access and Driveway	Screenshot 2023-08-11 15:22:00.png (39 KB)	06/10/2023 Owner User	PLANNA-CLA-2023-AEDT Request for Information - Planning
<input type="checkbox"/>	1	PlanBuild Document	PLANNA-CLA-2023-AEDT Request for Information (Completed).pdf	06/10/2023 LGA	PLANNA-CLA-2023-AEDT Request for Information - Planning

Select All Deselect All + Add Selected

### Assessment Documents

These documents and certificates have been submitted with this planning application OR have been added by Council as part of the review/assessment process.  
 All documents within this section are available/visible to all Referrals and Requests generated as part of this assessment.

Showing 1 to 7 of 7 entries

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By	Stamp
01	06/10/2023	06/10/2023	Property Title Document	0 FOLIO PLAN 16445_0_1.pdf	0 FOLIO PLAN 16445_0_1.pdf	1	<input type="checkbox"/>
01	06/10/2023	06/10/2023	Property Title Document	1 SCHEDULE OF EASEMENTS 16445_0_1.pdf	1 SCHEDULE OF EASEMENTS 16445_0_1.pdf	1	<input type="checkbox"/>

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

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

## What can you do with the Assessment Documents?

The screenshot shows the 'Assessment Documents' section of a web application. It features a table with columns for Version, Uploaded Date, Document Date, Document Type, Description, Filename (size), Prepared By, and Stamp. There are also buttons for '+ Add Revision' and '+ Add Document'. A 'Stamp Date' field is present at the bottom left, and a 'Download All' button is at the bottom right. Numbered callouts (1-6) point to specific elements: 1 points to the version selection radio button, 2 to the stamp field, 3 to the download icon, 4 to the unlink icon, 5 to the edit icon, and 6 to the 'Stamp' column header.

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By	Stamp
1	25/09/2023	25/09/2023	Property Title Document	0 Folio Text 132051_0_1.pdf	0 Folio Text 132051_0_1.pdf	1	
1	25/09/2023	25/09/2023	Property Title Document	1 FOLIO PLAN 132051_0_1.pdf	1 FOLIO PLAN 132051_0_1.pdf	1	
1	25/09/2023	07/09/2023	Property Title Document	0 Folio Text 132051_0_2.pdf	0 Folio Text 132051_0_2.pdf	1	
1	25/09/2023	18/09/2023	Property Title Document	1 FOLIO PLAN 132051_0_2.pdf	1 FOLIO PLAN 132051_0_2.pdf	1	
1	25/09/2023	05/09/2023	Architectural Plans	plans	BUILD-2023-XYPC_Architectural Plans_1_Jones House Plan.pdf (3 MB)	Owner User	

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

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

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





## Internal Referrals

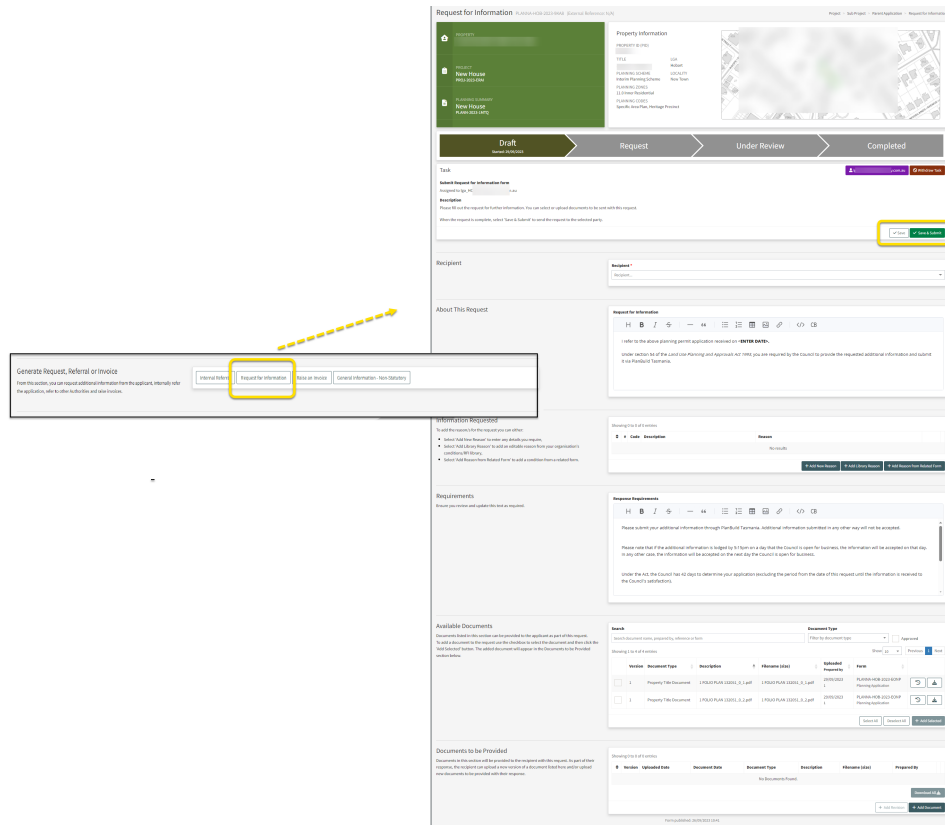
The referral process for different kinds of applications and referred parties follow the same process.

Choose the appropriate form under the 'Generate Request, Referral or Invoice' section. Select the correct recipient and enter the details of the referral request. 'Save and Submit' the form.

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

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

## Request Further Information



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

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

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

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

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

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

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



## Finalise the assessment

Once the assessment is complete and you are ready to issue the certificate, permit or consent (or refusal) the signature field must be completed by an authorised person.

See details in the 'Administrative Revisions to a Certificate, Approval or Consent' guide.

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

