



PlanBuild
TASMANIA

Respond to a Referral

Version 1

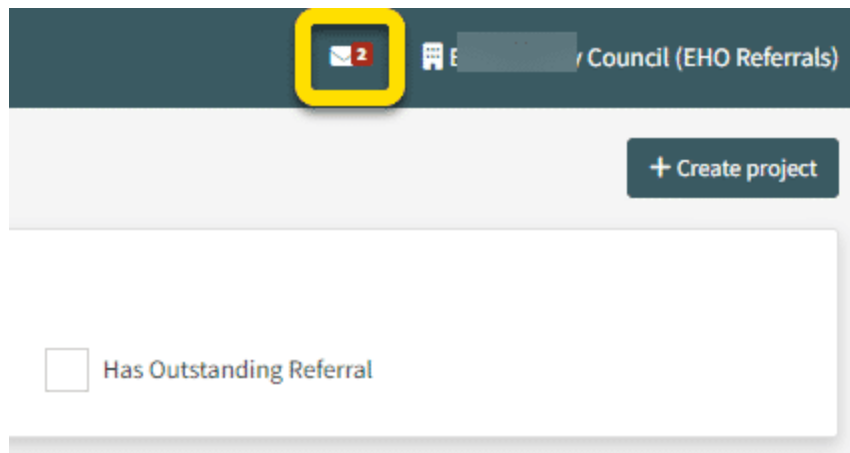
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How do I know if a referral has been made to me / my team?

Regardless of the application type and which internal department the referral is sent to, the same principles apply when responding to them.

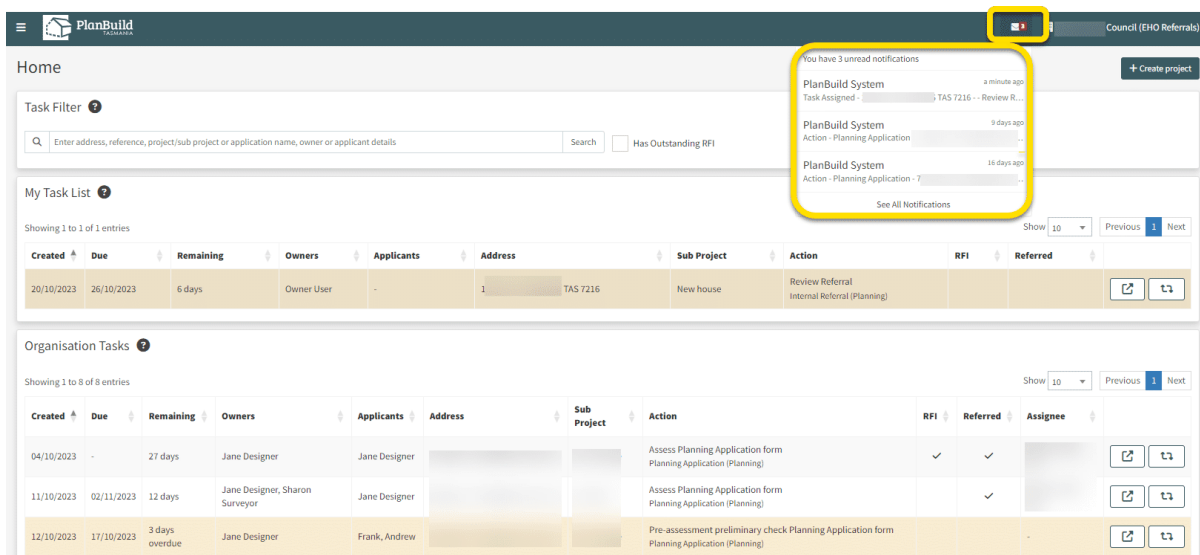
PlanBuild Tasmania Notifications



Like any other task in the portal, you will see a notification in your PlanBuild Tasmania mailbox when a new referral is made.

A notification email will also be sent to the email address you registered with PlanBuild Tasmania.

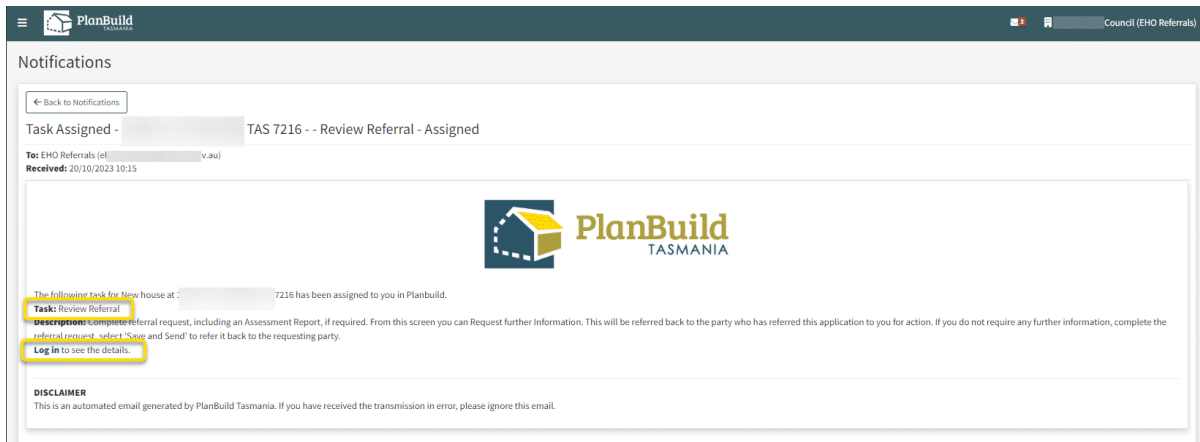
Respond to a Referral



The screenshot shows the PlanBuild Tasmania dashboard. In the top right corner, there is a notification icon (a white envelope) with a red badge indicating 3 unread notifications. A yellow box highlights this icon and the notification dropdown menu that appears below it. The dropdown menu lists three notifications from the PlanBuild System, with the most recent one being 'Task Assigned - TAS 7216 - Review R...'. Below the notification menu, the dashboard displays a 'My Task List' and 'Organisation Tasks' section, both with table views showing task details like 'Created', 'Due', 'Remaining', 'Owners', 'Applicants', 'Address', 'Sub Project', and 'Action'.

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

You can click on the notifications to view full details.



The screenshot shows the content of a notification email from PlanBuild Tasmania. The email title is 'Task Assigned - TAS 7216 - - Review Referral - Assigned'. The sender is 'EHO Referrals (e [redacted] v.au)' and it was received on '20/10/2023 10:15'. The PlanBuild Tasmania logo is prominently displayed. The main body of the email states: 'The following task for New house at: [redacted] 7216 has been assigned to you in Planbuild.' It then lists the task as 'Review Referral' and provides a description: 'Complete referral request, including an Assessment Report, if required. From this screen you can Request further Information. This will be referred back to the party who has referred this application to you for action. If you do not require any further information, complete the referral request - select "Save and Send" to refer it back to the requesting party.' A 'Log in' link is highlighted with a yellow box, indicating it leads to the task details. A disclaimer at the bottom states: 'This is an automated email generated by PlanBuild Tasmania. If you have received the transmission in error, please ignore this email.'

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

Task Lists

The screenshot shows the PlanBuild dashboard interface. At the top, there is a navigation bar with the PlanBuild logo and a user profile icon. Below this is a 'Home' section with a 'Task Filter' search bar and a '+ Create project' button. The main content area is divided into two sections: 'My Task List' and 'Organisation Tasks'.

My Task List: Shows 1 of 1 entries. The table has columns: Created, Due, Remaining, Owners, Applicants, Address, Sub Project, Action, RFI, Referred. The single entry is:

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred
20/10/2023	26/10/2023	6 days	Owner User	-	TAS T216	New house	Review Referral Internal Referral (Planning)		

Organisation Tasks: Shows 1 to 8 of 8 entries. The table has columns: Created, Due, Remaining, Owners, Applicants, Address, Sub Project, Action, RFI, Referred, Assignee. The entries are:

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred	Assignee
20/10/2023	25/10/2023	4 days	Owner User	Owner User		New house	Pre-assessment preliminary check Planning Application form Planning Application (Planning)		✓	
16/10/2023	-	-	Jane Designer, Sharon Surveyor	-			Submit Referral of RFI Response to Authority form Referral of RFI Response to Authority (Planning)			
13/10/2023	18/10/2023	2 days overdue	Jane Designer, Sharon Surveyor				Pre-assessment preliminary check Planning Application form Planning Application (Planning)			

Alternatively, you can find the new referral task in one of the Task Lists on your dashboard:

If you are the only person in the organisation assigned to handle the referral, the task will appear under 'My Task List' automatically.

If there are more than one authorised user, the task will appear under 'Organisation Tasks' for any of you to open, view and claim.

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

Review and respond to the referral

Claim Task

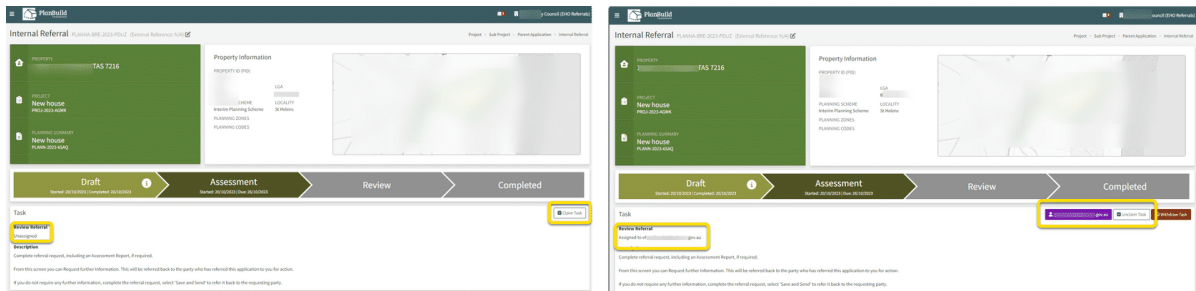


Image on the left - You have to select 'Claim Task' first if the task was not directly assigned to you.

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

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

Navigate to the Application Summary

The image shows two screenshots from the PlanBuild system. The left screenshot is the 'Internal Referral' page for 'New House' (TAS 7216). A yellow box highlights the 'PLANNING SUMMARY' link, with a dashed arrow pointing to the right. The right screenshot is the 'Planning Summary' page, which provides a detailed overview of the application. It includes sections for 'Property Report', 'Available Applications/Forms', 'Submitted or Active Applications/Forms', 'Sub Project Access', 'Users', 'Owners', and 'Notes'. A 'Submitted' status is visible for the 'Planning Application'.

Planning Summary

The Planning Summary will provide you with a quick overview of information related to your Planning work. i.e. applications completed or available to start and a summary of the people involved in your Planning work.

Property Report

To find out if there are any interactions that affect this property, or to check if Council or Council consent is required for your proposed use or development, click on the 'Generate Property Report' button.

Available Applications/Forms

There are forms available for you to consider. 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.

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.

Sub Project Access

These are the parties that have access to this Sub Project. To invite another party to this Sub Project select the 'Invite' button.

Users

Name	Email	Role	Details	Added
Owner User	no-reply@emerge.org.au@emerge.com.au	Owner		20/10/2023
Owner User	no-reply@emerge.org.au@emerge.com.au	Project Administration		20/10/2023
Owner User	no-reply@emerge.org.au@emerge.com.au	Applicant	Applicant	20/10/2023

Owners

Name	Email	Status
Owner User	no-reply@emerge.org.au@emerge.com.au	Registered Owner

Notes

Created On	Item Reference	Created By	Content
20/10/2023	PLANNING-SUMMARY-2023-10-20 Internal Referral	BRUCE_OBRIEN@EA	Planning summary (PL)

By clicking on the 'Sub Project Summary' in the project panel, you will be directed to the Sub Project page. You can open the application here to check the details and download the application documents if needed.

Review and respond

The screenshot displays a web interface for reviewing and responding to a referral. It is organized into several sections:

- Referred By:** A dropdown menu showing 'Planning Admin Officer'.
- Notes:** A section with instructions on how to use notes, attachments, and communications. It includes a table with columns 'Created On', 'Created By', and 'Content'. The table is currently empty, showing 'Showing 0 to 0 of 0 entries' and 'No notes available.' There are 'Previous' and 'Next' navigation buttons and a '+ Add Note' button.
- Reason for Referral:** A text area containing a blurred document image. Below the image are 'Edit Reason' and '+ Add Library Reason' buttons.
- Council Description:** A text area with a placeholder 'Council Proposed Use or Development Description'.
- Referral Report Type:** A dropdown menu with 'Referral Report...' selected.

You can view who the referral was sent from, the details of the referral and any notes or documents attached.

The notes and document appears in the Notes section is only visible internally. You may see further information or handover notes put in by the Assessing Officer and/or other users. And You can also add new ones in.

In the 'Communications tab', users can address the message to a particular internal user. They will then receive a notification via their Dashboard.

Generate Templates

Conditions
Use this section to add any conditions that you require to be added to the planning permit.

Showing 0 to 0 of 0 entries

#	Code	Description
No results		

+ Add Custom Condition + Add Library Condition + Add Referral Condition

Document Templates
Use this to generate the Referral Assessment template

Document Template
Document Template...

Download

Request Information
Use this section to request any further information you require to complete your referral assessment.

Request Further Information

Requests

Showing 0 to 0 of 0 entries

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

Show 10 Previous Next

Additional Documents
Use this section to upload any relevant documentation.

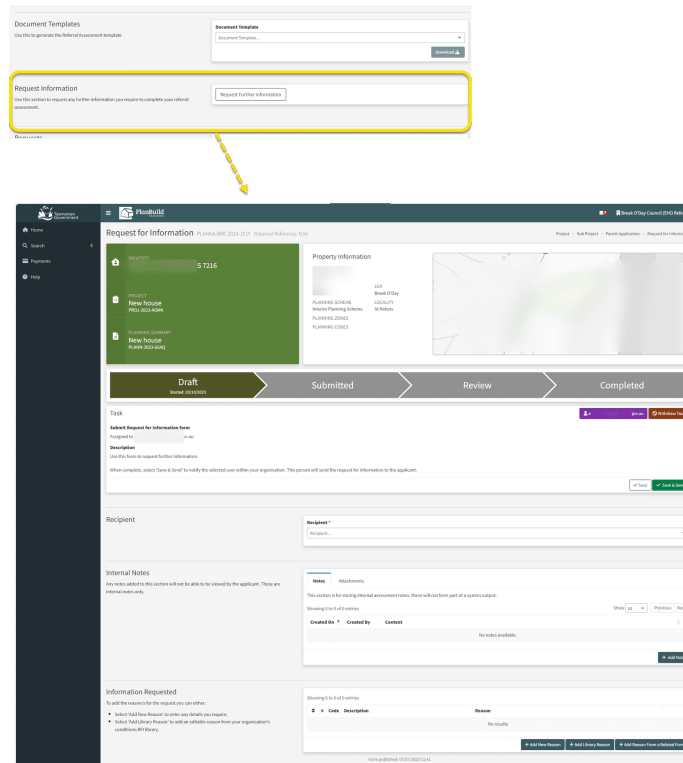
Showing 0 to 0 of 0 entries

If using PlanBuild Tasmania for the full assessment, enter assessment details and conditions in the form directly.

Alternatively (please refer to your organisation's process), you can download the pre-uploaded assessment template and fill out externally, upload it to this form as an attachment and send back to the referred party.

Prior to downloading the template, please select 'save' as details you have entered may inform the template.

Request Further Information



If you need further information from the referred party or another user (e.g. a user from another team) to complete your referral response, you can request that under 'Request Further Information', which opens a form where you can select the recipient and enter the information required.

Select 'Save and Send' to confirm. When the selected party responds, you will receive a PlanBuild Tasmania notification, email and will be able to see the review task under 'My Task List'.

Document Uploads

Additional Documents
Use this section to upload any relevant documentation.
If you have created any documents outside of PlanBuild, use this section to upload any documents that need to go to the requesting party.

Showing 0 to 0 of 0 entries

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By
No Documents Found.						

+ Add Revision + Add Document Download All

Form published: 17/10/2023 12:08

You can upload documents with the referral response under 'Additional Documents' if needed. If uploaded here the documents will form part of the Available Documents, which the assessor can select from as part of their assessment.

If you need to attach a document for internal use only, you may make use of the attachment function of the 'Notes' section. Any notes and documents uploaded to this section will only be visible to internal users of your organisation. These can also be seen at a Sub Project level by all users in your organisation.

Confirm

The screenshot shows a web interface titled "Review and Confirm". On the left, there is a summary card for an "INTERNAL REFERRAL". The card includes the Tasmanian Government and PlanBuild Tasmania logos, the status "Assessment", and various fields: Reference (PLANNA-BRE-2023-PDUZ), Sub Project (PLANN-2023-85AQ - New house), Address, Project (PROJ-2023-AGMK - New house), Titles, Referred By (Planning Admin Officer), Council Description, Council Proposed Use or Development Description, Referral Report Type, Referral Report (Referral Report - Environmental Development Planner), and Referral Recommendation. On the right, a "Review & Confirm" panel contains instructions: "On Confirm, the referral will be sent back to the requesting party. If you have created any documents outside of PlanBuild Tasmania, use the 'Additional Documents' to upload any documents that need to go to the requesting party." Below this is a checkbox labeled "Confirm". At the bottom right of the interface are two buttons: "Confirm" and "Cancel".

Select 'Save and Send' when ready to send the response.

You will be prompted to review the response before confirming it.