



PlanBuild
TASMANIA

TasWater User Guide: Acknowledge a new Application (Submitted)

All TasWater applications share a similar workflow in PlanBuild Tasmania.

In this guide, we are using a Certificate for Certifiable Work (CCW) application to illustrate the features and application steps in PlanBuild Tasmania, but these principals apply regardless of the application type.

Acknowledge a new Application (Submitted)

Find the Task

After the applicant has submitted the application, it will be available to be seen on the PlanBuild Dashboard by users with the 'Admin Officer' role.

The following tips might help you find a task:

1. Any available / unassigned tasks you have access to as the logged in user will appear under 'Organisation Tasks'. Any tasks you currently have claimed / assigned to you will appear under 'My Task List'. If there is only one Admin Officer in the Department, the task will go directly to their 'My Task List'. Organisation tasks assigned to the currently logged in user is also based on their assigned role.
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 'Acknowledge Submitted Application form'.
4. Select the 'pop out' button to open the task in a new tab (so that you can view the referral or application and other details you need from dashboard). You can click on the 'cycle' button to view the referral history (including payment request) of the referral / application.
5. 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'.

The screenshot displays the PlanBuild dashboard interface. At the top, there's a navigation bar with the PlanBuild logo and a user profile icon. Below this, the 'Home' section is visible. A 'Task Filter' button with a yellow circle containing the number 5 is located above a search bar. The search bar contains the text 'Enter address, reference, project/sub project or application name, owner or applicant details'. Below the search bar, there are two sections: 'My Task List' and 'Organisation Tasks'. The 'My Task List' section shows a table with columns: Created, Due, Remaining, Owners, Applicants, Address, Sub Project, Action, RFI, and Referred. It contains two tasks. The 'Organisation Tasks' section shows a table with columns: Created, Due, Remaining, Owners, Applicants, Address, Sub Project, Action, RFI, Referred, and Assignee. It contains three tasks. Numbered callouts are placed over the dashboard: 1 points to the 'Organisation Tasks' header, 2 points to the search bar, 3 points to the 'Action' column in the 'Organisation Tasks' table, 4 points to the 'Pop out' button in the 'Organisation Tasks' table, and 5 points to the 'Task Filter' button.

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)	✓	✓

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)	✓		
21/08/2023	31/08/2023	47 days overdue	Owner User	Owner User	3		Assess Certificate for 56W Consent form Certificate for 56W Consent (TasWater)			
22/08/2023	25/08/2023	54 days overdue	Bob Builder	Bob Builder	5		Assess Certificate for 56W Consent form Certificate for 56W Consent (TasWater)			

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.

The screenshot shows the 'Draft' stage of a task. At the top, there is a progress bar with four stages: 'Draft' (highlighted in green), 'Submitted', 'Assessment', and 'Completed'. Below the progress bar, the task title is 'Task'. The main content area contains the text: 'Acknowledge submitted Application for Certificate(s) for Certifiable Work form', 'Confirm all required information has been submitted.', and 'Assigned to: Unassigned'. A yellow box highlights a 'Claim Task' button in the top right corner.

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.

The screenshot shows the 'Submitted' stage of a task. A 'Reassign Task' dialog box is open, prompting the user to 'Select a User to Assign to *'. The dialog box contains a search bar and a list of email addresses: 't@taswater.com.au', '@taswater.com.au', 'h@taswater.com.au', '@taswater.com.au', and '@geometry.com.au'. The '@taswater.com.au' address is highlighted. A yellow dashed arrow points from the dialog box to a purple button with a user icon and the email address 't@taswater.com.au' in the bottom right corner of the task card. The task card also features an 'Unclaim Task' button. The progress bar at the top shows 'Submitted', 'Assessment', and 'Completed' stages. The bottom of the screen has 'Save' and 'Save & Confirm' buttons.

Navigate to other applications/documents

You can navigate to other Sub Projects and applications using the project panel.

By clicking the 'Project' box, you will be directed to the Project page and be able to see other Sub Projects under the same Project.

By clicking the 'TasWater Summary' box, you will be directed to the Sub Project page where you can see other TasWater applications that are set up under the same Sub Project.

Note: Any user in your organisation can access this information, however only those with the required role (e.g. Admin Officer) and department (e.g. TasWater Development Services) will be able to claim the task and interact.

Certificate(s) for Certifiable Work

TASWACCW-CLA-2023-GUNJ (External Reference: N/A)

PROPERTY

8

PROJECT

Bathroom

PROJ-2023-HZG5

TASWATER SUMMARY

Bathroom

TASWA-2023-ESRD

Property Information

PROPERTY ID (PID)

TITLE

5

L

C

PLANNING SCHEME

Tasmanian Planning Scheme

L

N

PLANNING ZONES

General Residential

PLANNING CODES

Airport obstacle limitation area

Draft

Started: 10/10/2023 | Completed: 11/10/2023

Submitted

Started: 11/10/2023 | Completed: 11/10/2023

View Payment

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 and payment search page which shows all payments related to this application only.

All 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.

In the 'new' application form, you are required to choose the 'Related Form' from the dropdown. If there is more than one, check the reference on the Sub Project page and pick the certification that you need to supersede.

Note: If you leave this blank, the form will be submitted as a new individual application and will not be associated with any previous application/s.

The image shows a two-part screenshot. The top part is a 'Draft' application form for 'Certificate(s) for Certifiable Work form'. It has a 'Go to Payments' button highlighted with a yellow box and an arrow pointing to the bottom part of the screenshot. The bottom part is the 'Payments' page, which includes a search bar and a table of payment records.

Task
Acknowledge submitted Application for Certificate(s) for Certifiable Work form
Assigned to elise.barwick@taswater.com.au

Description
Confirm all required information has been submitted.

Go to Payments

Payments

Payment Search

TASWACW-HOB-2023-A83R

Date Paid: Date Issued: Payment Pending

Showing 1 to 4 of 4 entries

Issued Date	Application Number	Name	Invoice Number	Payee Name	Property Address	Total	Total GST	Receipt Number	Paid on Date
04/09/2023	TASWACW-HOB-2023-A83R	TASWAA-HOB-2023-UWJH: Request Payment	37915334			\$333.00	\$0.00		
05/09/2023	TASWACW-HOB-2023-A83R	TASWAA-HOB-2023-GLPJ: Request Payment	90156295			\$749.17	\$0.00		
05/09/2023	TASWACW-HOB-2023-A83R	TASWAA-HOB-2023-LU8H: Request Payment	64134391			\$389.86	\$0.00		
05/09/2023	TASWACW-HOB-2023-A83R	TASWAA-HOB-2023-CYSM: Request Payment	96463967			\$51.09	\$0.00		

Internal Communications

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

The information will not be visible to the applicants or anyone outside of the organisation and will not form part of a system output. There are 3 tabs:

- 1. Notes** - It can be used for any kind of 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 an assessor or a staff member who is taking over the task.
- 2. Attachments** - This section is for storing internal assessment documents that can be downloaded by another user within your organisation that will not be part of the assessment documents.
- 3. 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.

All content in the Internal Communications section is visible to other users in your organisation.

Internal Communications

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.

NotesAttachmentsCommunications

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

Showing 0 to 0 of 0 entries

Show10PreviousNext

Created On	Created By	Content
No notes available.		

+ Add Note

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. adjusting the category of work under 'Request to pay details').

Generate Request, Referral or Invoice

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

Raise an Invoice

Request for Information

Internal Referral

Request Payment

Started: 11/01/2024

Awaiting Payment

Acknowledge

Paid

Task

Submit Request Payment form

Create a request for payment by selecting the 'New Line Item' button to add the relevant fees.

Assigned to: Ted Tasikator

Save

Save & Create Invoice

Recipient

Recipient *

Recipient...

Request to Pay Details

Details of Request

B I S

— 66

Invoice

Showing 0 to 0 of 0 entries

Name	Ledger Code	Base (\$)	Units	Per Unit (\$)	Sub Total (\$)	GST (\$)	Total (\$)
No line items for this invoice.							

Save

New Line Item

Raise an Invoice (cont)

Under 'Invoice', select '+New line item' to select individual payment item(s). You may add multiple line items to a single request. If you start typing TasWater under the Fee heading, all the TasWater fees will be visible. The relevant financial year fee will populate. Review the fee for each line item before saving.

Once all the individual line items are completed and checked click 'Save & Create Invoice' to generate the request. A 'Review and Confirm' window will show where you can review prior to issuing request to the application for payment.

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.

Add a new invoice line item

Fee *

Fee...

☐ Custom Fee

Description

Description...

Ledger Code

Ledger Code...

Base Total (\$)

Base Total (\$)...

Units

Units...

Rate per Unit (\$)

Rate per Unit (\$)...

GST (\$)

0.00

Calculated Total (\$)

0.00

Save Line Item

X Cancel

Payment methods

For upfront payments, applicants can pay via:

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

Credit card payments will be processed at the time of submitting an application. The application will then appear on Council users' dashboard.

BPay payments will be processed overnight. This means the application will only appear at TasWater users' dashboard on the day after the payment has been made. Before that, the application will sit with the application under 'Draft' status and not visible for TasWater.

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 staff to do so or the application is a TasWater application (Stranded asset).

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

Payment method – Office Use Only

The 'Office Use Only' button allows an applicant to submit the application without making a payment. An applicant should only use this option after being instructed by a TasWater staff member to do so. The application will appear on TasWater users' dashboard once the application is submitted.

If 'Office Use Only' has been used to submit an application, a red banner with 'Office Use Only' will appear on the top of the application form.

To review this, the relevant TasWater user can see the comment provided from the applicant and why they used out of office. To accept this,

1. Select a reason from the drop-down menu,
2. Include your comment
3. Select 'Save' at the top right of the screen.

The red banner will then disappear, and the review of the application can continue. If it is determined that payment is required, an invoice can be raised as needed.

The screenshot displays the PlanBuild application form for 'Application for Certificate(s) for Certifiable Work'. The form is divided into several sections:

- Property Information:** Includes details for 18 ELIZABETH ST HOBART TAS 7000, including the title 'Building Extension' and the project ID 'PROJ-HOB-2024-0054'.
- Task:** Shows the task 'Acknowledge submitted Application for Certificate(s) for Certifiable Work form' with a 'Download Form' button.
- Office Use Only Banner:** A red banner at the top of the form indicating that office use was selected during submission.
- Assessor Comments:** A section for the assessor to provide comments, including a 'Reason' dropdown menu and a 'Save' button.

Numbered callouts highlight the following elements:

1. The 'Reason' dropdown menu in the Assessor Comments section.
2. The 'Assessor Comments' text area.
3. The 'Save' button in the top right corner of the form.

Review application details

You can review the application details before starting the assessment. The application form sections will look different depending on the type of application.

Any greyed-out sections mean editing is not allowed.

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

Primary contact phone number

Other contact phone number

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*

New Dwelling

Constructing near TasWater Infrastructure

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

☐ Yes (S&W)

☒ No

Classification of Work

Please select a classification for your work*

Minor Works

Available Documents and Assessment Documents

'**Assessment Documents**' show all documents that have been submitted with this application or have been added as part of the review/assessment process.

These are the documents that will form part of the assessment and approval. Admin Officers / Assessment Officers can unlink any irrelevant documents if needed, and those documents will stay under '**Available Documents**'. They can be added back in the future if needed.

Acknowledge submitted Minor Amendment to Planning Permit form

Save

Start Assessment

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

Showing 10

Previous

Next

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

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	
1	06/10/2023	06/10/2023	Property Title Document	0 FOLIO PLAN 16445_0_1.pdf	0 FOLIO PLAN 16445_0_1.pdf	1	
1	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	
1	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	
1	06/10/2023	06/10/2023	Property Title Document	0 Folio Text 16445_0_1.pdf	0 Folio Text 16445_0_1.pdf	1	

Available Documents and Assessment Documents

'**Available Documents**' will list any documents that are available as part of the Sub Project. Documents uploaded as part of a Request for Further Information or Referral will also be shown here. If there are no documents under '**Available Documents**', it means that there are no previously uploaded documents for that Sub Project.

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

The completed referral requests and any documents obtained throughout the administration and assessment processes will be listed under '**Available Documents**'. To make these documents available to Referrals and Requests as well as the approved output, from the '**Available Documents**' section, use the checkboxes to select relevant documents and click the 'Add Selected' button to move these documents to the '**Assessment Documents**' section.

All documents under '**Assessment Documents**' will form part of the assessment and 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.

Download Form
Assess Amended Planning Application form

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
Filter by document type
Approved

Showing 1 to 3 of 3 entries

Version

Document Type

Description

Filename (size)

Uploaded Prepared by

Form

☐
1
Access and Driveway
Request for Information
Screenshot 2023-08-11 15:22:00.png (39 KB)
06/10/2023 Owner User
PLANNA-CLA-2023-AEDT Request for Information-Planning

☐
1
PlanBuild Document
Request for Information
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	
1	06/10/2023	06/10/2023	Property Title Document	0 FOLIO PLAN 16445_0_1.pdf	0 FOLIO PLAN 16445_0_1.pdf	1		☐ Download Unlink Edit
1	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		☐ Download Unlink Edit

What can you do with the Assessment Documents?

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).

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 5 of 5 entries 1 row selected

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By	
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	☐ Download Unlink Edit
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	☐ Download Unlink Edit
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	☐ Download Unlink Edit
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	☐ Download Unlink Edit
1	25/09/2023	05/09/2023	Architectural Plans	plans	BUILDIA-2023-KYPC_Architectural Plans_1_Jones House Plan.pdf (3 MB)	Owner User	☐ Download Unlink Edit

Download All
+ Add Revision
+ Add Document

Request for Information

You may request more information before starting the assessment. Use the 'Request for Information' button to open up the form, complete required details and insert the request reason using either the '+Add New Reason' button for free typing or '+Add Library Reason' for standard requests that have been saved in the library.

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.

Progress the application for assessment

When you are ready to progress the application, click 'Save and Confirm' to progress it to Assessment status. The statutory clock will now start, and the task will be available for an 'Assessing Officer' to claim.

There is an option to 'Reject Application' if needed - this will mean the applicant will need to start a completely new application and should be avoided where possible (particularly where fees have been paid). Many of the issues can be fixed via requesting further information or you can raise an invoice if additional fees are required to be paid.

Draft Started: 04/09/2023 Completed: 04/09/2023	Submitted Started: 04/09/2023 Completed: 20/10/2023	Assessment Started: 20/10/2023 Due: 30/10/2023	Completed
Task			
Assess Certificate(s) for Certifiable Work form			
Unassigned			
Description			
Assessment is required			