



**PlanBuild**  
TASMANIA


# Pre-assessment Preliminary Check - Planning Application

**Version 1**



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## 1. Find the Task (The new Planning Application)

Home + Create project

Task Filter 5

Enter address, reference, project/sub project or application name, owner or applicant details Search  Has Outstanding RFI  Has Outstanding Referral

My Task List Showing 1 to 10 of 85 entries

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred
25/09/2023	17/10/2023	21 days	Owner User	Owner User	16-08	LM-R32A-45 v3	Assess Planning Application form Planning Application (Planning)		
24/09/2023	26/10/2023	31 days	Owner User	-	1-000	test	Assess Notification of Low Risk - Building Work (Form 80) form Notification of Low Risk - Building Work (Form 80) (Building)		

Organisation Tasks Showing 1 to 10 of 24 entries

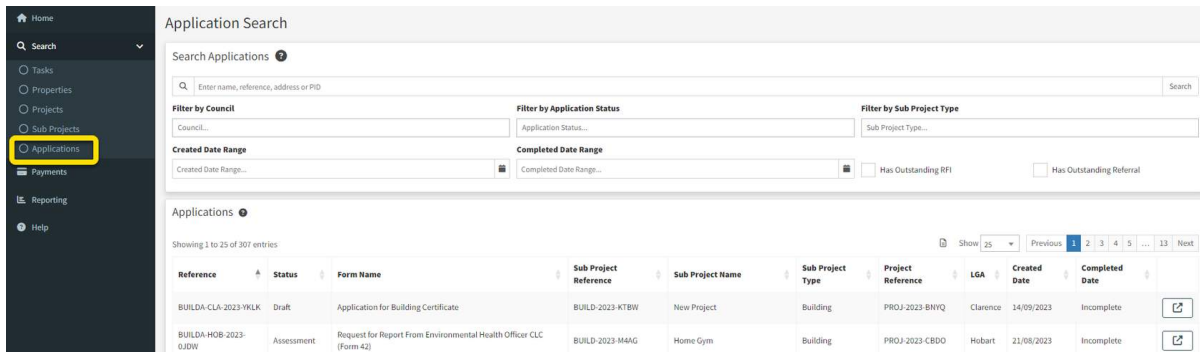
Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred	Assignee
25/09/2023	02/10/2023	6 days	Owner User	Owner User	7-008	New house	Pre-assessment preliminary check Planning Application form Planning Application (Planning)			

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

The following tips might help you find a task:

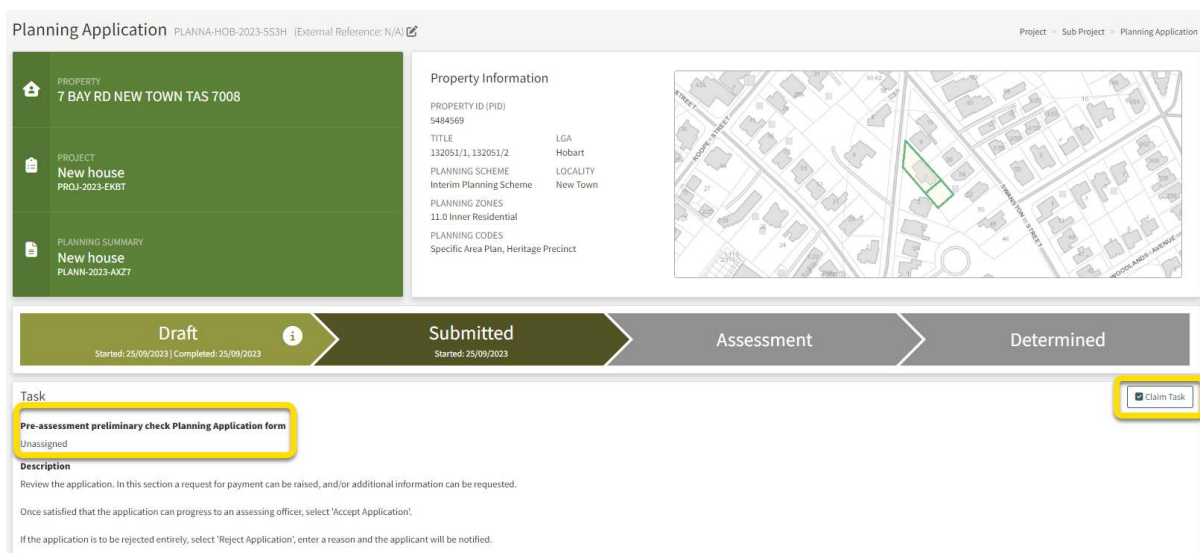
1. Any unassigned tasks you have access to will appear under 'Organisation Tasks'. Any tasks you currently have claimed will appear under 'My Task List'. If there is only one Admin Officer in the Department, the task will go directly to their 'My Task List'.
2. You can select any of the column headings 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.
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).
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'.

## 2. Search for the Task (The new Planning Application)



Alternatively, you can go to the Application Search page via the left-hand-side navigation bar, and search for the specific Planning Application.

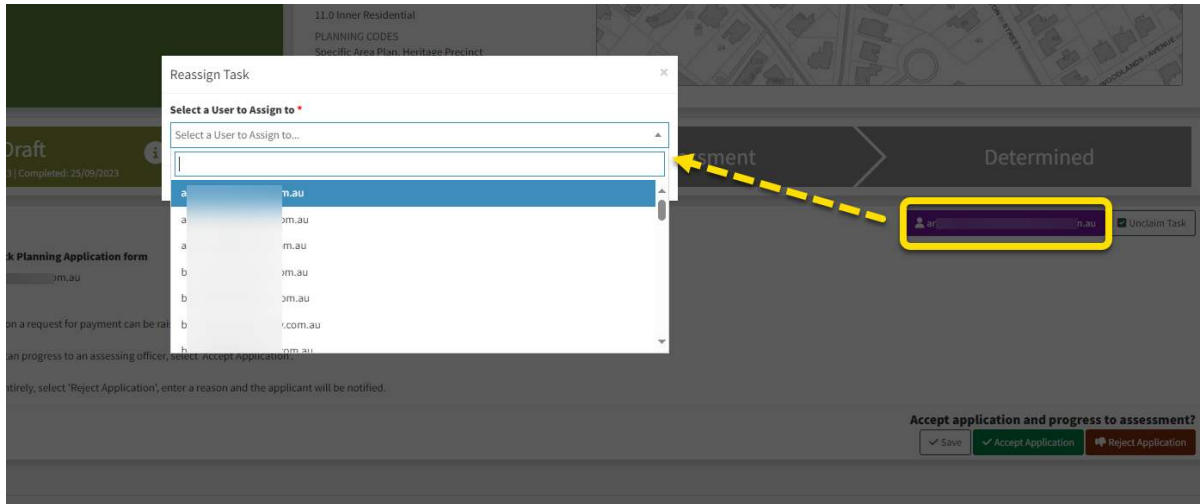
## 3. Claim Task



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

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

## 4. 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 users '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 to claim.

## 5. Navigate to other applications/documents

The screenshot displays the 'Planning Application' interface. At the top, it shows the application ID 'PLANNA-CLA-2023-TMOC' and an external reference '(External Reference: N/A)'. The main content area is divided into three sections: 'PROPERTY' with ID '7018', 'PROJECT' with title 'New house' and ID 'PROJ-2023-OE9V', and 'PLANNING SUMMARY' with title 'New house' and ID 'PLANN-2023-LY8P'. A yellow box highlights the 'PROJECT' and 'PLANNING SUMMARY' sections. To the right, a 'Property Information' sidebar lists details: PROPERTY ID (PID), TITLE, LGA (Clarence), PLANNING SCHEME (Tasmanian Planning Scheme), LOCALITY (Rosny Park), PLANNING ZONES (Central Business), and PLANNING CODES (Potentially contaminated land, Airport obstacle lir area, Waterway and coastal protection area, Flood). At the bottom, a progress bar shows 'Draft' (Started: 25/09/2023 | Completed: 25/09/2023) and 'Submitted' (Started: 25/09/2023).

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

By clicking the 'Planning Summary' box, you will be directed to the Sub Project page and be able to see other applications that were lodged under the same Sub Project.

By clicking the 'Project' box, you will be directed to the Project page where you can see other Sub Projects that are set up under the same Project. For example, a building assessor would be able to access the planning permit application here and find the planning permit conditions.

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. Planning) will be able to claim the task and interact.

## 6. View Payment

**Task**

**Pre-assessment preliminary check Planning Application form**  
Assigned to lga\_CLARENCE@geometry.com.au

**Description**  
Review the application. In this section a request for payment can be raised, and/or additional information can be requested.  
Once satisfied that the application can progress to an assessing officer, select 'Accept Application'.  
If the application is to be rejected entirely, select 'Reject Application', enter a reason and the applicant will be notified.

**Go to Payments**

**Payments**

Payment Search

PLANNA-CLA-2023-TMOC

Date Paid: [ ] Date Issued: [ ] Payment Pending

Showing 1 to 1 of 1 entries

Issued Date	Application Number	Name	Invoice Number	Payee Name	Property Address	Total	Total GST	Receipt Number	Paid on Date
25/09/2023	PLANNA-CLA-2023-TMOC	PLANNA-CLA-2023-TMOC: Planning Application	01248314	Owner User	30 GORDONS HILL RD ROSBY PARK TAS 7018	\$902.00	\$0.00	30/0617871	25/09/2023

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.

## 7. 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.

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

Showing 1 to 2 of 2 entries

Created On	Created By	Content
16/04/2024		[Redacted]
16/04/2024		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. 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. Attachment - to attached any documents for internal use only.
3. communications - make a note to one or more specific internal user(s). Users being named in the message will receive the communication via their dashboard.



## 8. Raise an Invoice

**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.

Advertising Referral | General Information - Non-Statutory | Heritage Tasmania Referral | Request for Information | Internal Referral | **Raise an Invoice**

Provide RFI Response to Heritage Tasmania | TasWater Referral

### Request Payment

PLANNING.CLA.2023.0276 (External Reference: N/A)

Project > Sub-Project > Parent Application > Request Payment

**PROPERTY**  
30 GORDONS HILL RD ROSNY PARK TAS 7018

**PROJECT**  
New House  
PROJ.2023.0276

**PLANNING SUMMARY**  
New House  
PLANN.2023.0276

**Property Information**

PROPERTY ID (PID)  
5370359

TITLE  
JAMES J CLARENCE

PLANNING SCHEME  
Tasmanian Planning Scheme

LOCALITY  
Rosny Park

PLANNING ZONES  
Central Business

PLANNING CODES  
Potentially contaminated land, Airport obstacle limitation

**Request Payment** | Awaiting Payment | Acknowledge | Paid

**Task**  
**Submit Request Payment Form**  
Assigned to IGA, CLARENCE@geometry.com.au

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

**Recipient**  
Recipient \*

**Request to Pay Details**  
**Details of Request**

**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.							

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 shaded 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 response ready for review.

## 9. Review application details

Application Checklist

**As part of the preliminary review of the application, at a minimum, please check:**

- The right title and schedule of easements have been provided.
- The right fee has been paid.
- The plans are legible.
- The information provided by the applicant is correct/sufficient.
- Does it adjoin Council owned land? If so, please refer to Parks.

**Please also don't forget to check for:**

- TasWater
- TasNetworks
- Archaeology
- Contaminated sites
- Is it a Major Project?
- Who has delegation to determine the application

**Checked By**

Pre-Application Advice

**Have you spoken with anyone at Council about this application?**

Yes - enter details below

No - continue to the next section

**If yes, provide the name of the person you contacted**

Enter name and position (if known).

Applicant

Showing 1 to 1 of 1 entries

Name	Email	Phone	Address	Involvement
Owner User	no-reply.ownerapp-org-user@geometry.com.au	0400123456	123 Test Street, Hobart, 7000, Tasmania, Australia	Applicant

You can review the application details during the pre-assessment preliminary check stage. The application form sections will look different depending on the type of application.

Any greyed-out sections means editing is not allowed.

## 10. 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. Admin Officer / 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.

## Pre-assessment Preliminary Check - Planning Application

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 152200.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.

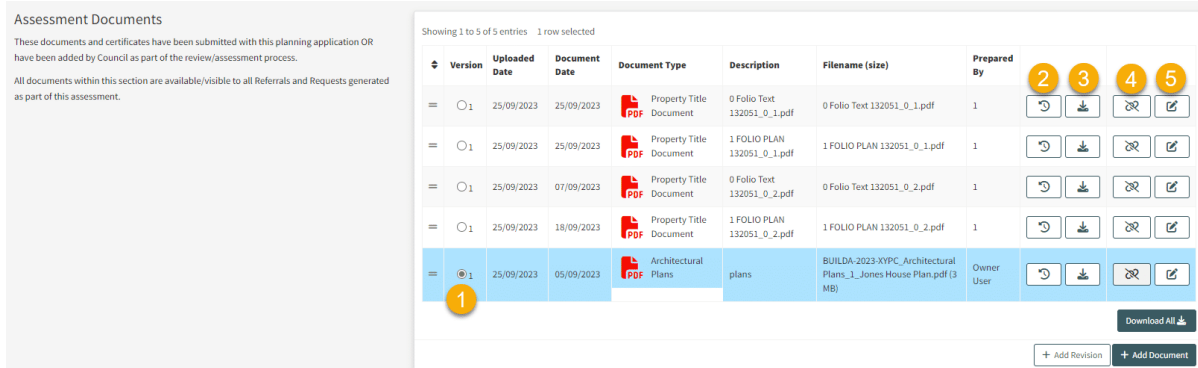
Showing 1 to 7 of 7 entries

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By	Stamp
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	<input type="checkbox"/>
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	<input type="checkbox"/>

The completed referral requests and the documents obtained throughout the administration and assessment processes will be listed under 'Available Documents', you (or the Assessing Officer, if the response is only available after this stage) 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.

# 11. 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).

## 12. Request for Information

**Generate Request, Referral or Invoice**  
Open this section, you can request information from the applicant, internally refer the application, refer to other Authorities and raise invoices.  
**Ensure you save this form prior to generating a request to ensure current data is saved to record.**

General Information - New Statutory - Refer an Invoice - **Request for Information** - Advertising Referral - Planning Assessment Report - Internal Referral  
Heritage Referral - Provide an Response to Heritage Tasmania - Tankster Referral

**Request for Information**  
Refer to the above planning permit application received on **ENTER DATE**.  
Under section 54 of the Land Use Planning and Approvals Act 1993 you are required by the Council to provide the requested additional information and submit it to the Council's satisfaction.

**Information Required**  
To add the reasons for the request you can either:  
• Select 'Add New Reason' to enter any details you require.  
• Select 'Add Library Reason' to add or update a reason from your organisation's conditions/ID library.  
• Select 'Add Reason from Request Form' to add a condition from a related form.

**Requirements**  
Ensure you review and update this text as required.

**Available Documents**  
Documents that are available to be provided to the applicant as part of this request. To add a document to the request use the checkbox to select the document and then click the 'Add Document' button. The added document will appear in the Documents to be Provided section below.

Version	Document Type	Description	File Name (URL)	Uploaded Properties	Form
<input type="checkbox"/>	Property Title Document	1700-PLAN LIBRARY_1_1.pdf	1700-PLAN LIBRARY_1_1.pdf	2019/03/23	ALPINE-MSB-2021-020P Planning Application
<input type="checkbox"/>	Property Title Document	1700-PLAN LIBRARY_1_2.pdf	1700-PLAN LIBRARY_1_2.pdf	2019/03/23	ALPINE-MSB-2021-020P Planning Application

**Documents to be Provided**  
Documents that are available to be provided to the applicant with this request. As part of this request, the recipient can upload a new version of a document from their own system and upload new documents to be provided with their response.

Version	Uploaded Date	Document Date	Document Type	Description	File Name (URL)	Prepared By
No Documents Found						

**Save & Submit**

You may request more information while performing the pre-assessment preliminary check. Use the 'Request for Information' button to open up the form, inset 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.

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.



### 13. Assessment Timeframe

**Assessment Timeframe**

Select the planning assessment timeframe relevant to the application type:

- Permitted Application Assessment - 28 days
- Discretionary Application Assessment - 42 days

Once selected, the timeframe for assessing the application will be set.

**Assessment Timeframe**

**Start Date**

Start Date...

**Planning Assessment Timeframe**

Planning Assessment Timeframe...

**Calculated Assessment Due Date**

21 council business days from assessment start

User with 'Admin Officer' role can set the assessment timeframe if required. The assessment timeframe can also be set by the 'Assessing Officer' at the next step, so it can be left blank at this stage.

### 14. Progress the application to the assessor

Go to Payments Pre-assessment preliminary check Planning Application form

Discretionary Application Assessment - 42 days

Once selected, the timeframe for assessing the application will be set.

**Assessment Timeframe**

**Start Date**

Start Date...

**Planning Assessment Timeframe**

Planning Assessment Timeframe...

**Calculated Assessment Due Date**

21 council business days from assessment start

Accept application

Save Accept Application Reject Application

Planning Assessment Report

**Document Template**

Document Template...

Download

When you are ready to progress the application, click 'Accept Application' to progress it to the next submission stage. The statutory clock will not start until the 'Assessing Officer' has the opportunity to read through the application and click 'Start Assessment' on their task.

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).