



**PlanBuild**  
TASMANIA


# TasWater User Guide: Acknowledge a new submitted Application

Version 1



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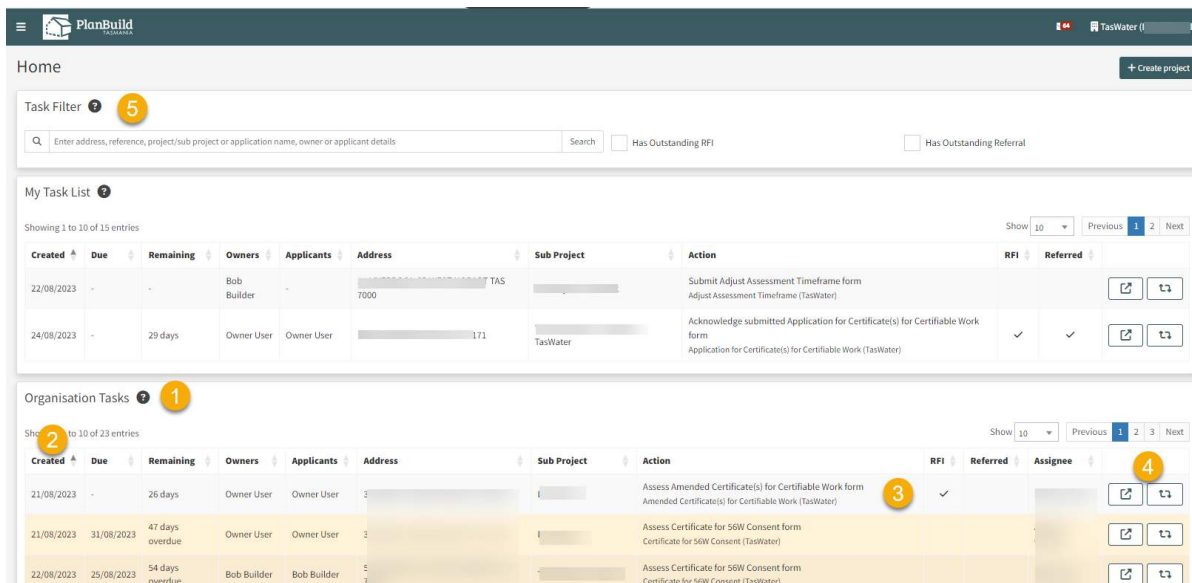


## Introduction

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



## Find the Task

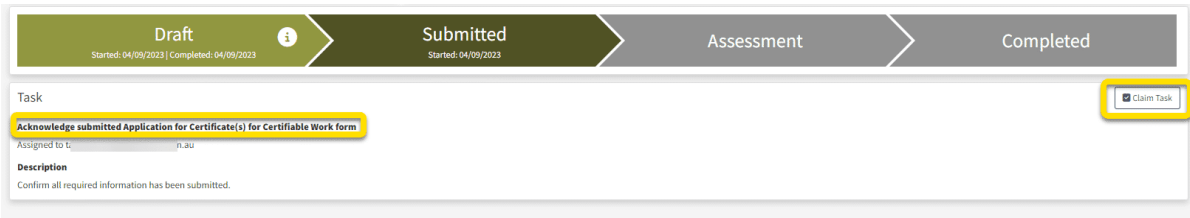


After the applicant has submitted the application, it will be available to be seen on the PlanBuild Dashboard by users with the 'Admin Officer' role.

The following tips might help you find a task:

1. Any 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. 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 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. 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'.

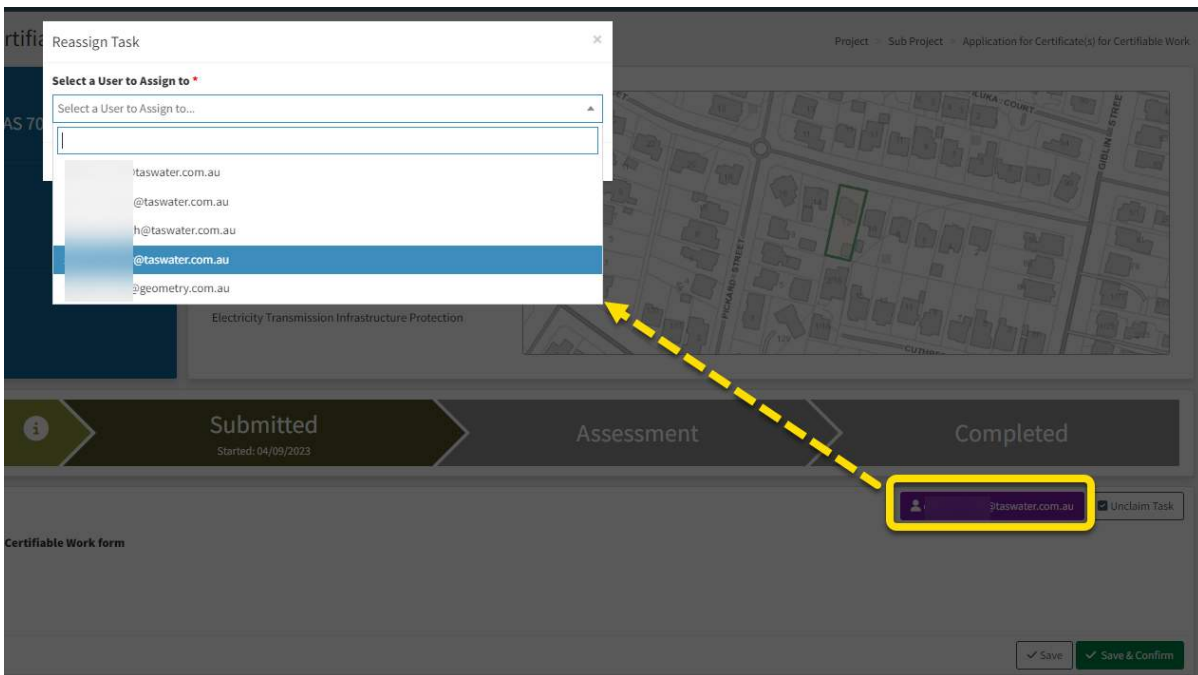
## Claim Task



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

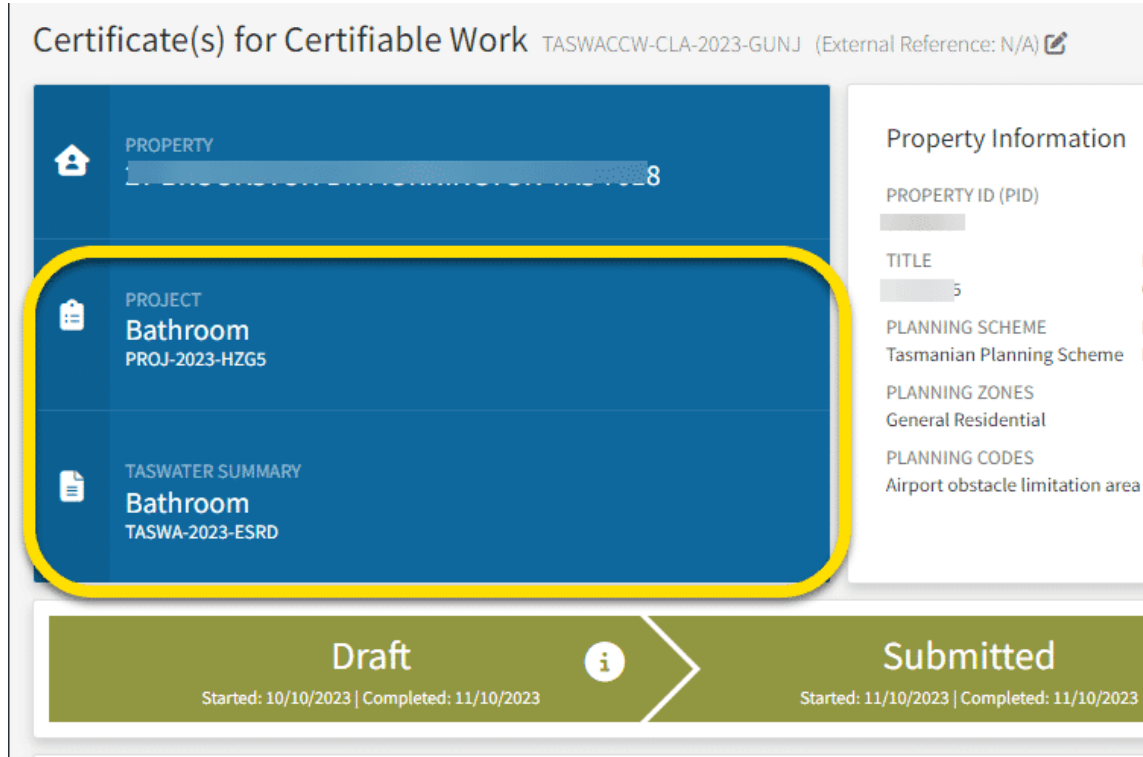


You can unclaim the task using the 'Unclaim' button or reassign it to others using the purple button with your email address on it if needed.

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.

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

## View Payment

**Draft** Started: 04/09/2023 | Completed: 04/09/2023

**Submitted** Started: 04/09/2023

**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 ?

TASWACCW-HOB-2023-A83R Search

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  | TASWACCW-HOB-2023-A83R | TASWAA-HOB-2023-UWJH: Request Payment | 37915334       |            |                  | \$333.00 | \$0.00    |                |              |
| 05/09/2023  | TASWACCW-HOB-2023-A83R | TASWAA-HOB-2023-GLPJ: Request Payment | 90156295       |            |                  | \$749.17 | \$0.00    |                |              |
| 05/09/2023  | TASWACCW-HOB-2023-A83R | TASWAA-HOB-2023-LU8H: Request Payment | 64134391       |            |                  | \$389.86 | \$0.00    |                |              |
| 05/09/2023  | TASWACCW-HOB-2023-A83R | TASWAA-HOB-2023-CYSM: Request Payment | 96463967       |            |                  | \$51.09  | \$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.

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

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 team member who is taking over the task.

Using the 'Communications' tab, users can select one or more user to receive the communication with a due date for action.





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 fields and sections:

- Fee \***: A dropdown menu with "Fee..." and a checkbox labeled "Custom Fee".
- 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 greyed-out 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 be 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

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 (56W)

No

Classification of Work

Please select a classification for your work\*

Minor Works

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.

## 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 Officers / Assessment Officers 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  1

| 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<br>Owner User | PLANNA-CLA-2023-AEDT<br>Request for Information - Planning |
| <input type="checkbox"/> | 1             | PlanBuild Document  | Request for Information                    | 06/10/2023<br>LGA        | PLANNA-CLA-2023-AEDT<br>Request for Information - Planning |

**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                    |
|--------------------------|---------------|---------------|-------------------------|---------------------------------------|---------------------------------------|-------------|--------------------------|
| <input type="checkbox"/> | 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"/> | 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.

## What can you do with the Assessment Documents?

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 | 2 | 3 | 4 | 5 |
|---------|---------------|---------------|-------------------------|-----------------------------|--|-------------|---|---|---|---|
| 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                       | BUILDA-2023-XYPC_Architectural Plans_1_Jones House Plan.pdf (3 MB) | Owner User  | 🔄 | 📄 | 🔗 | ✎ |

Download All 📄

+ Add Revision + Add Document

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).

# Request for Information

The screenshot displays the 'Request for Information' form. At the top, there is a progress bar with four stages: Draft, Request, Under Review, and Completed. The 'Request' stage is currently active. Below the progress bar, the 'Task' section contains a 'Submit Request for Information form' button, which is highlighted with a yellow box. A yellow dashed arrow points from this button to the 'Request for Information' button in the 'Generate Request, Referral or Invoice' section. The form also includes sections for 'Property Information', 'Recipient', 'About This Request', 'Information Required', 'Requirements', 'Available Documents', and 'Documents to be Provided'.

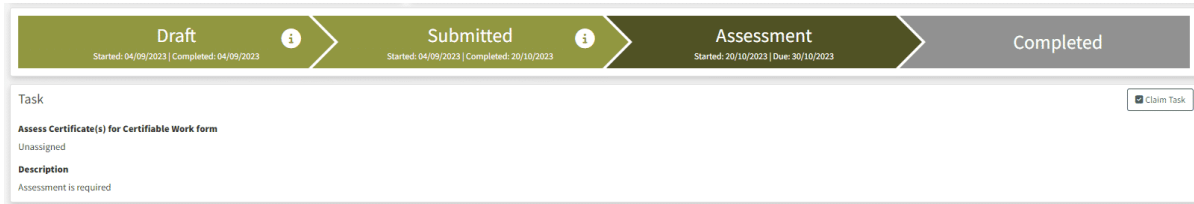
You may request more information before starting the assessment. Use the 'Request for Information' button to open up the form, insert the request using either the '+Add New Reason' button for free typing or '+Add Library Reason' for standard requests that have been saved in the library.

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



The screenshot shows a task progress bar with four stages: Draft, Submitted, Assessment, and Completed. The 'Submitted' stage is currently active. Below the bar, the task details are displayed:

| Task   | Claim Task                          |
|--|-------------------------------------|
| <b>Assess Certificate(s) for Certifiable Work form</b> | <input type="checkbox"/> Claim Task |
| Unassigned   |                                     |
| <b>Description</b>                                     |                                     |
| Assessment is required                                 |                                     |

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 and you can raise an invoice if additional fees are required to be paid.