



**PlanBuild**  
TASMANIA


# Acknowledge a new submitted Application - Planning

**Version 1**



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## **1. Find the Task (Acknowledge Submitted Planning Application form)**

Once an application is submitted using PlanBuild Tasmania, an Admin Officer will first complete a 'pre-assessment preliminary check', which will accept the application, without beginning the assessment timeframe (planning only).

After the Admin Officer has accepted the application, a new task will be created for an Assessing Officer (i.e. Planner) to acknowledge the application. The statutory clock will not commence until the Assessing Officer completes this task by selecting 'Start Assessment'.

The acknowledgement task will be available in the 'Organisation Tasks' list on the dashboard, which provides another opportunity for the assessor to check if the application has included all required information and documents before starting the assessment.

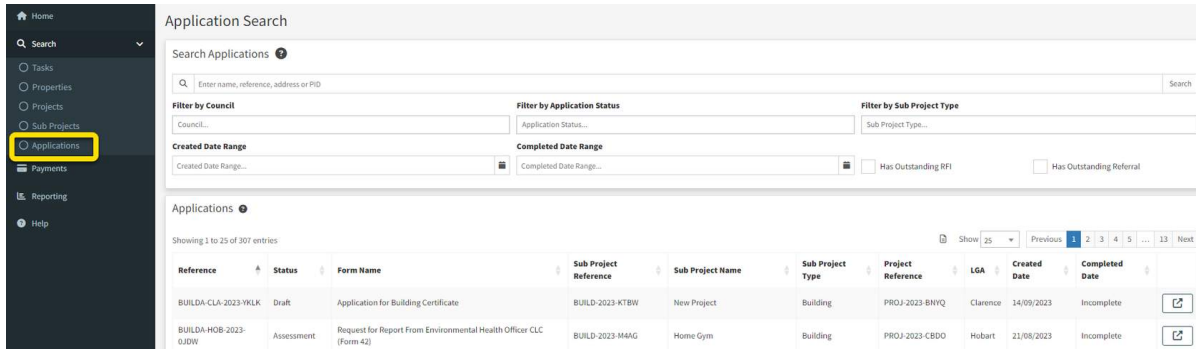
## Acknowledge a new submitted Application - Planning

The screenshot shows the PlanBuild Tasmania dashboard. 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'. A yellow circle with the number '6' is placed over the search bar. The main content area is divided into 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. The 'Organisation Tasks' section shows a similar table with an additional 'Assignee' column. A yellow circle with the number '1' is placed over the 'Organisation Tasks' header. A yellow circle with the number '2' is placed over the search bar in the 'Organisation Tasks' section. A yellow circle with the number '3' is placed over the 'Action' column in the 'Organisation Tasks' table. A yellow circle with the number '4' is placed over the 'Assignee' column in the 'Organisation Tasks' table. A yellow circle with the number '5' is placed over the 'RFI' column in the 'Organisation Tasks' table. A yellow circle with the number '6' is placed over the search bar in the 'Task Filter' section.

The following tips might help you find a task:

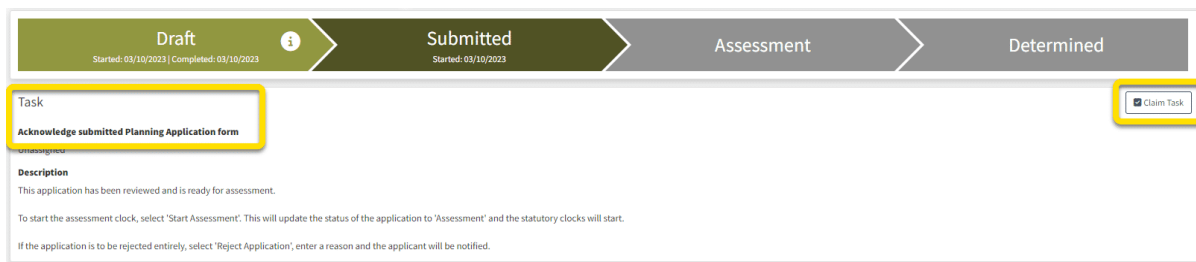
1. Any unassigned tasks you have access to will appear under 'Organisation Tasks'. Any tasks you currently have claimed will appear under 'My Task List'. If there is only one Admin Officer / Assessment Officer in the Department, the task will go directly to their 'My Task List'.
2. You can select any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

## 2. Search for the Task (Acknowledge Submitted Planning Application form)



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

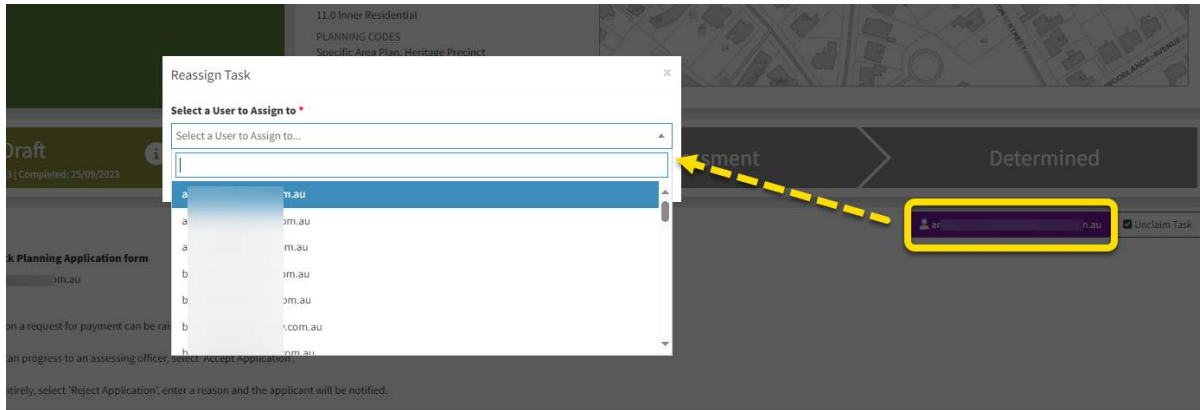
## 3. Claim Task



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.

## 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.

If reassigned, 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.

## 5. Navigate to other applications/documents

The screenshot displays a 'Planning Application' interface for application ID 'PLANNA-CLA-2023-TMOC'. The main content area is divided into three sections: 'PROPERTY' (7018), 'PROJECT' (New house, PROJ-2023-OE9V), and 'PLANNING SUMMARY' (New house, PLANN-2023-LY8P). A yellow box highlights the 'PROJECT' and 'PLANNING SUMMARY' sections. To the right, a 'Property Information' panel lists details such as '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 the application is in the 'Draft' stage, starting on 25/09/2023 and completed on 25/09/2023, with a 'Submitted' stage also starting on 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

**Draft** Started: 25/09/2023 | Completed: 25/09/2023

**Submitted** Started: 25/09/2023

**Task**

**Acknowledge submitted Planning Application form**  
Assigned to lga\_HOBART@geometry.com.au

**Description**  
This application has been reviewed and is ready for assessment.  
To start the assessment clock, select 'Start Assessment'. This will update the status of the application to 'Assessment' and the statutory clocks will start.  
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

Date Paid... Date Issued... Payment Pending

Payments

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 GORDON'S HILL RD ROSHY PARK TAS 7018	\$502.00	\$0.00	3578617371	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.

**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

Created On	Created By	Content	
16/04/2024			
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 | Planning Assessment Report | Heritage Referral | Request Information | Internal Referral

Raise an Invoice | Provide RPI Response to Heritage Tasmania | TasWater Referral

### Request Payment

PLANNING-CLA-3023-0230 (Internal Reference: N/A)

Property: 30 GORDONS HILL RD ROSNY PARK TAS 7018

Project: New house (PROJ-2023-0230)

Planning Summary: New house (PLANN-2023-178P)

Property Information: PROPERTY ID (PID): S179239; TITLE: LGA: Clarence; LOCALITY: Rosny Park; PLANNING SCHEME: Tasmanian Planning Scheme; PLANNING ZONES: Central Business; PLANNING CODES: Potentially contaminated land, Airport obstacle limitation.

Request Payment (Started: 24/09/2023) | Awaiting Payment | Acknowledge | Paid

Task: Submit Request Payment form (Recipient: tip.CLARENCE@planbuild.com.au)

Recipient: [Dropdown menu]

Request to Pay Details: Details of Request (Rich text editor)

Invoice: Showing 0 to 0 of 0 entries. Table with columns: 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).

Add a new invoice line item ✕

**Fee \***

Fee...  Custom Fee

**Description**

Description...

**Ledger Code**

Ledger Code...

**Base Total (\$)**

Base Total (\$)...

Units	Rate per Unit (\$)	GST (\$)
Units...	Rate per Unit (\$)...	0.00

**Calculated Total (\$)**

0.00

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.

## 9. Payment method - Office Use Only

Applicants can pay for the Planning Application 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

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 appear at Council 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 Council.

## 10. Review application details

The screenshot displays a web interface for reviewing application details, divided into three main sections:

- Application Checklist:** Contains a list of items to check during a preliminary review, such as 'The right title and schedule of easements have been provided.' and 'The right fee has been paid.' It also includes a section for 'Please also don't forget to check for:' with items like 'TasWater' and 'TasNetworks'. A 'Checked By' field is present at the bottom.
- Pre-Application Advice:** Features a question 'Have you spoken with anyone at Council about this application?' with radio button options for 'Yes - enter details below' and 'No - continue to the next section'. The 'No' option is selected. Below this is a text input field for 'Enter name and position (if known)'.
- Applicant:** Shows a table with one entry. The table has columns for Name, Email, Phone, Address, and Involvement.

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

Any greyed-out sections means editing is not allowed.

## 11. 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.

## Acknowledge a new submitted Application - Planning

[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**   Approved

Showing 1 to 3 of 3 entries

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	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
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 (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.

## 12. 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	Actions
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	2 3 4 5
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).



# 13. Request for Information

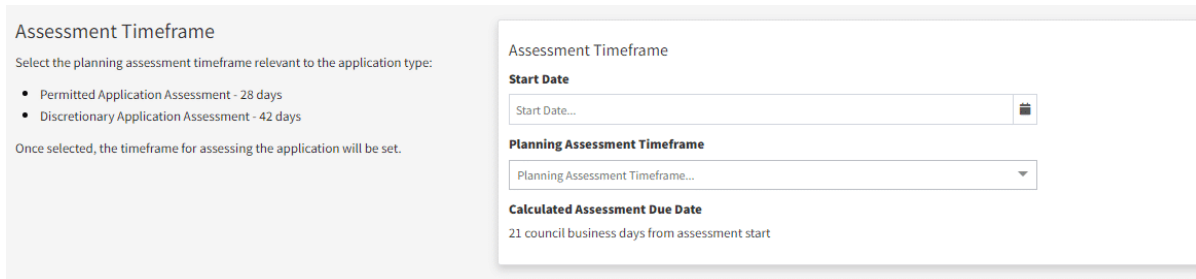
The screenshot displays the 'Request for Information' web application. On the left, a navigation menu contains buttons for 'Advertising Referral', 'General Information - Non-Statutory', 'Heritage Tasmania Referral', 'Request for Information', 'Intermittent Referral', and 'Raise an Invoice'. The 'Request for Information' button is highlighted with a yellow box. A yellow dashed arrow points from this button to the corresponding section in the main content area. The main content area features a progress bar with stages: Draft, Request, Under Review, and Completed. Below this, there is a task description, a recipient selection dropdown, and several sections: 'About This Request', 'Requirements', 'Available Documents', and 'Documents to be Provided'. The 'Available Documents' section contains a table with columns for 'Document Type', 'Description', 'Filename (URL)', 'Updated', and 'Form'. The 'Documents to be Provided' section contains a table with columns for 'Updated Date', 'Document Date', 'Document Type', 'Description', 'Filename (URL)', and 'Prepared By'.

You may request more information before starting the assessment. 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.

## 14. Setting Assessment Timeframe

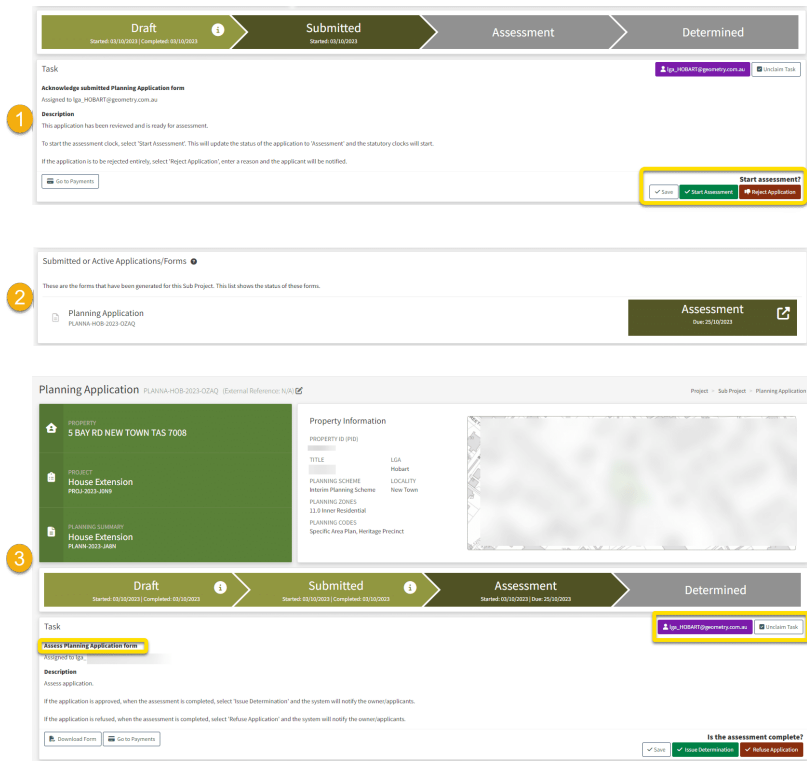


The screenshot shows a web interface for setting the assessment timeframe. On the left, a grey box titled 'Assessment Timeframe' contains the instruction 'Select the planning assessment timeframe relevant to the application type:' followed by two bullet points: 'Permitted Application Assessment - 28 days' and 'Discretionary Application Assessment - 42 days'. Below this, it states 'Once selected, the timeframe for assessing the application will be set.' On the right, a white box titled 'Assessment Timeframe' contains a 'Start Date' field with a calendar icon, a 'Planning Assessment Timeframe' dropdown menu, and a 'Calculated Assessment Due Date' field showing '21 council business days from assessment start'.

You can set the assessment timeframe at this stage.

If any adjustment of the timeframe is needed after this step, you can do that via the pause clock button or the 'Adjust Assessment Timeframe' form in the Sub Project (approval needed).

## 15. Start the assessment



1. Once the Assessing Officer clicks on the 'Start Assessment' button, The statutory clock will start.

2. You will be redirected to the Sub Project page. Scroll down to the 'Submitted or Active Applications/Forms' section, you will see the Planning Application is now under 'Assessment' status. Click on it and it will open the Assessment page. Alternatively, you can search for it in your 'Organisation Tasks' on the dashboard, the action should now be listed as 'Assess Planning Application Form'.

3. When you are on the Assessment page, you have the option to unclaim the Task or reassign to another user using the purple button (which has your email address on it). If the person starting the assessment is also responsible for assigning the assessment task to an individual assessor, open the assessment task and 'reassign' the task to an individual by selecting the purple button with your email address on it.

You can make use of the 'Notes' section to added internal notes and attachments, to provide detail/instruction to any internal users.