Acknowledge a new submitted Application - Planning

Version 1

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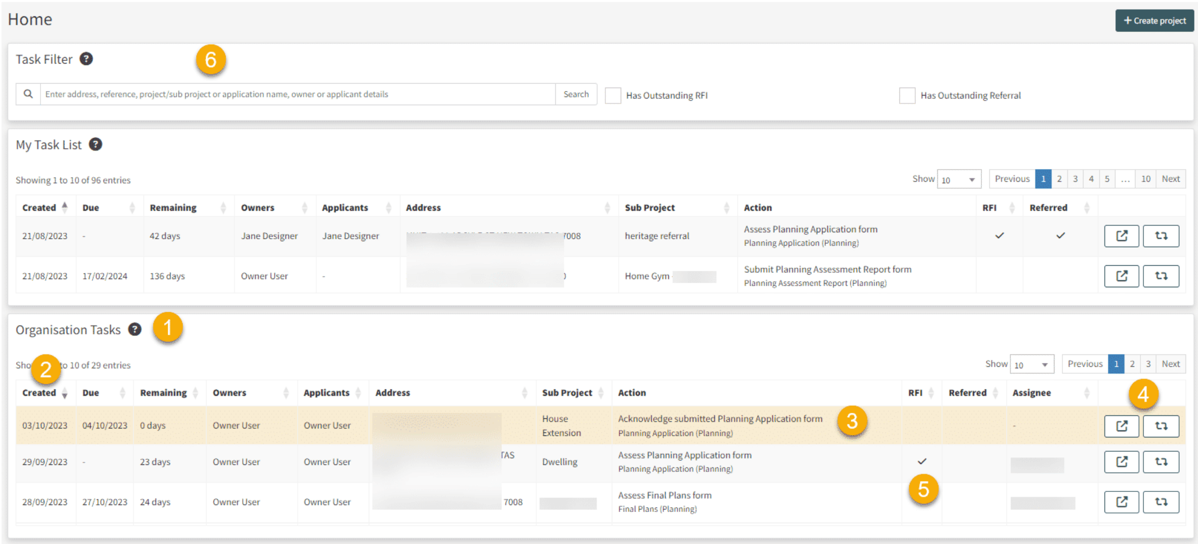
1. Find the Task (Acknowledge Submitted Planning Application form)

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.



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.

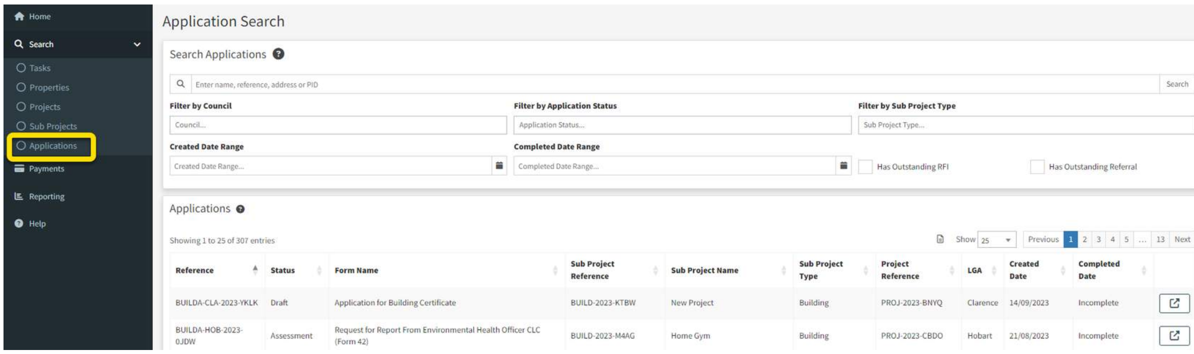
3. See the 'Action' column to check the type of application, and the action required. At this stage, the action item should be listed as 'Acknowledge Submitted Planning Application form'.

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.

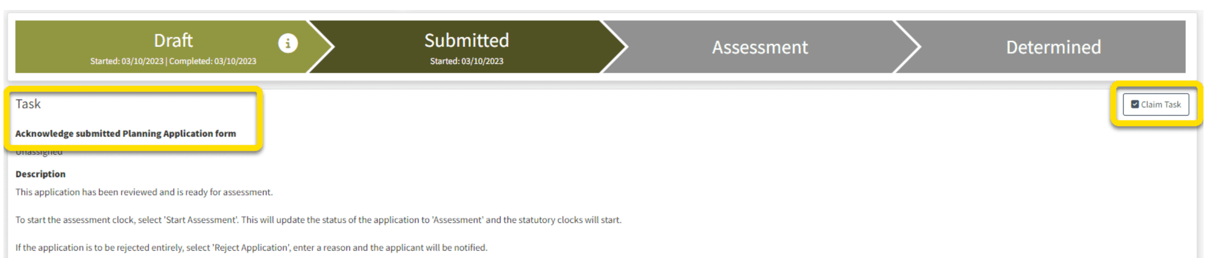
6. You can search for a task directly in the search bar by Address, Reference Number, Project, Sub Project or Application Name, Owner or Applicant details. This will filter both the 'My Task List' and 'Organisation Tasks'.

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.

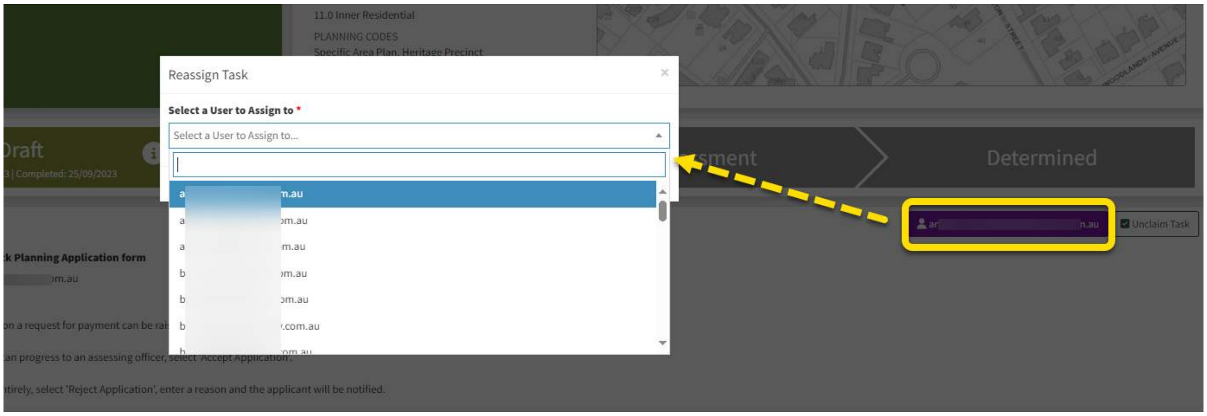
3. Claim Task



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

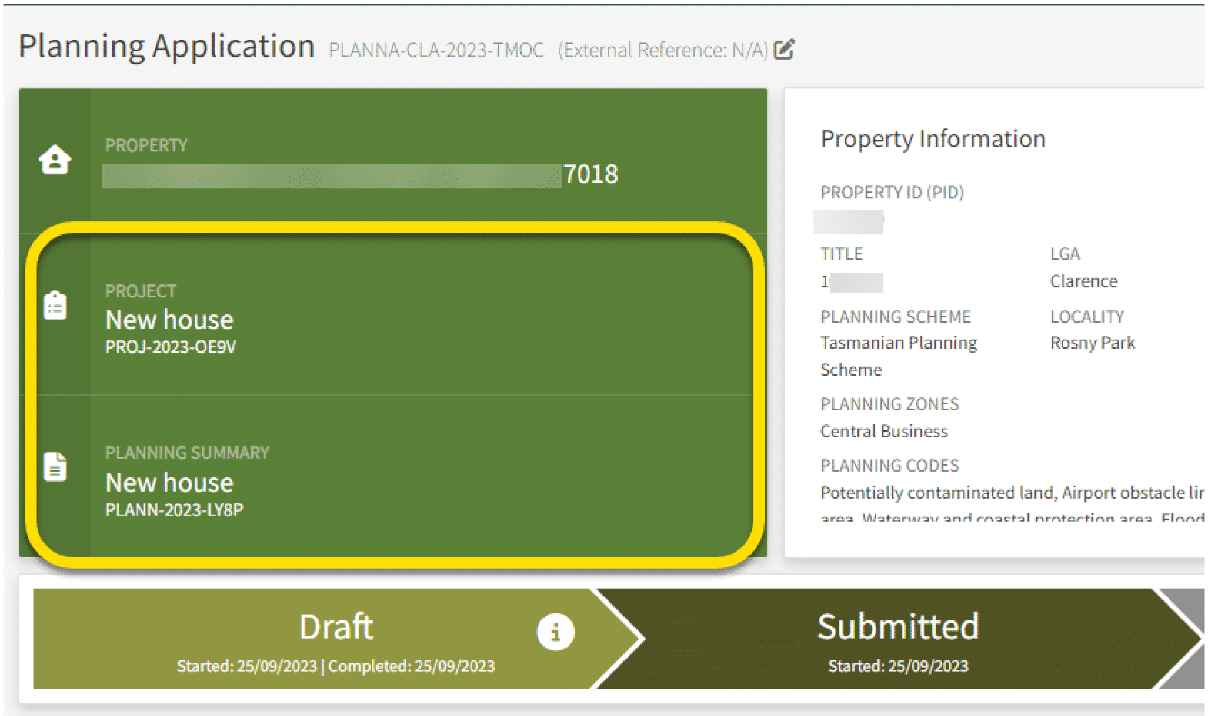


You can unclaim the task using the 'Unclaim' button or reassign it to others using the purple button with your email address on it if needed.

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



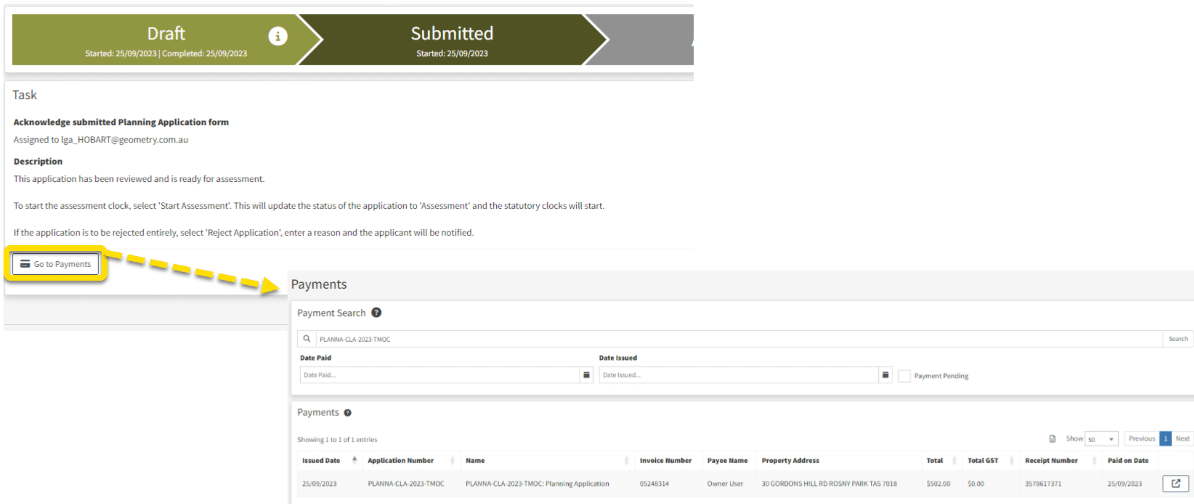
You can navigate to other Sub Projects and applications using the project panel.

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.

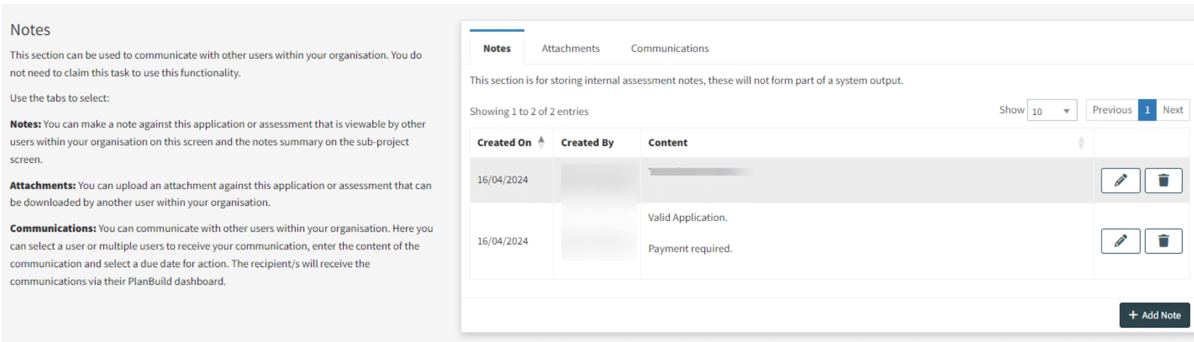
6. View Payment



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



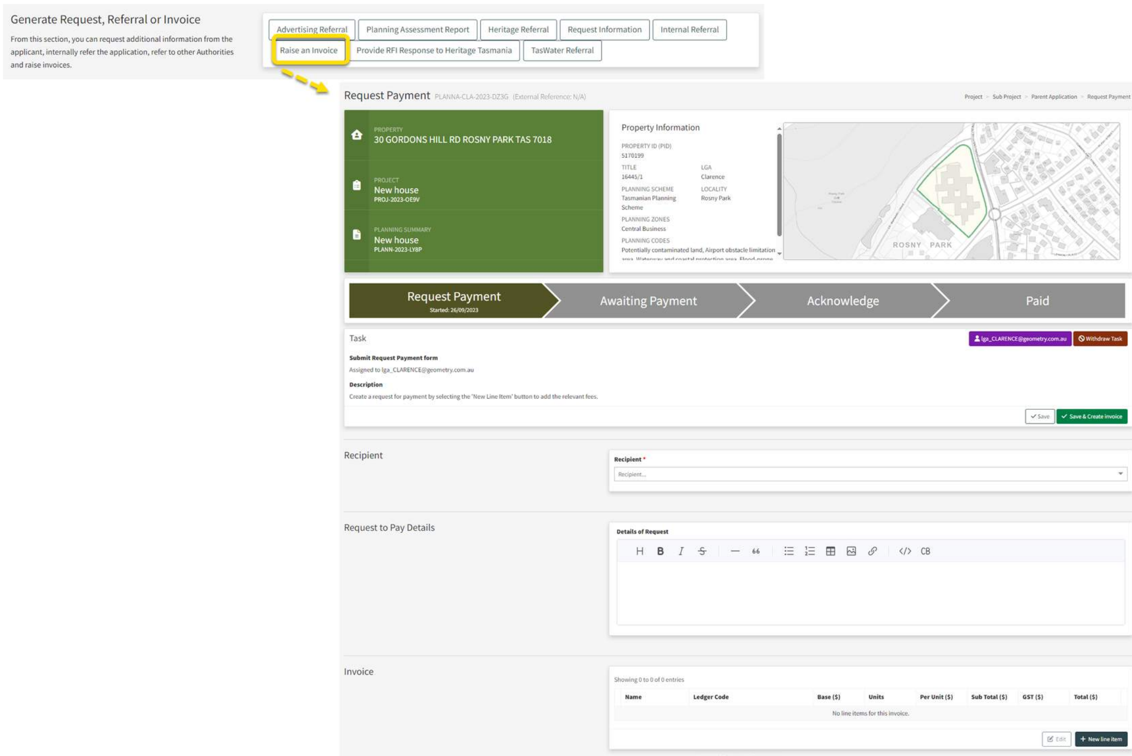
The 'Notes' section under the task description box is for internal use and the notes will not be visible to the applicants or anyone outside of the organisation. There are 3 tabs:

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.

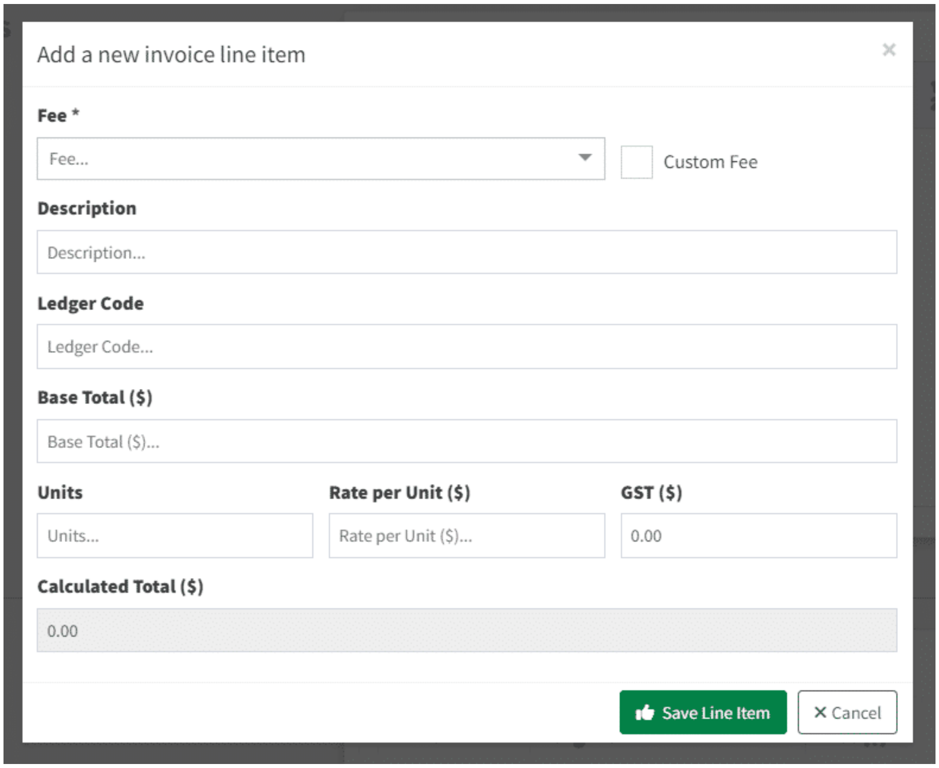
8. Raise an Invoice



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).



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.

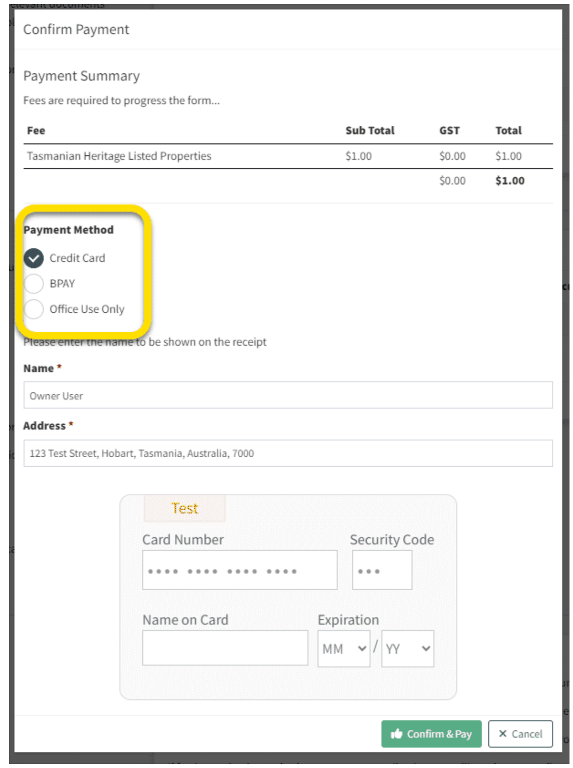
9. Payment method - Office Use Only

Applicants can pay for the Planning Application via:

1. Credit card

2. BPay

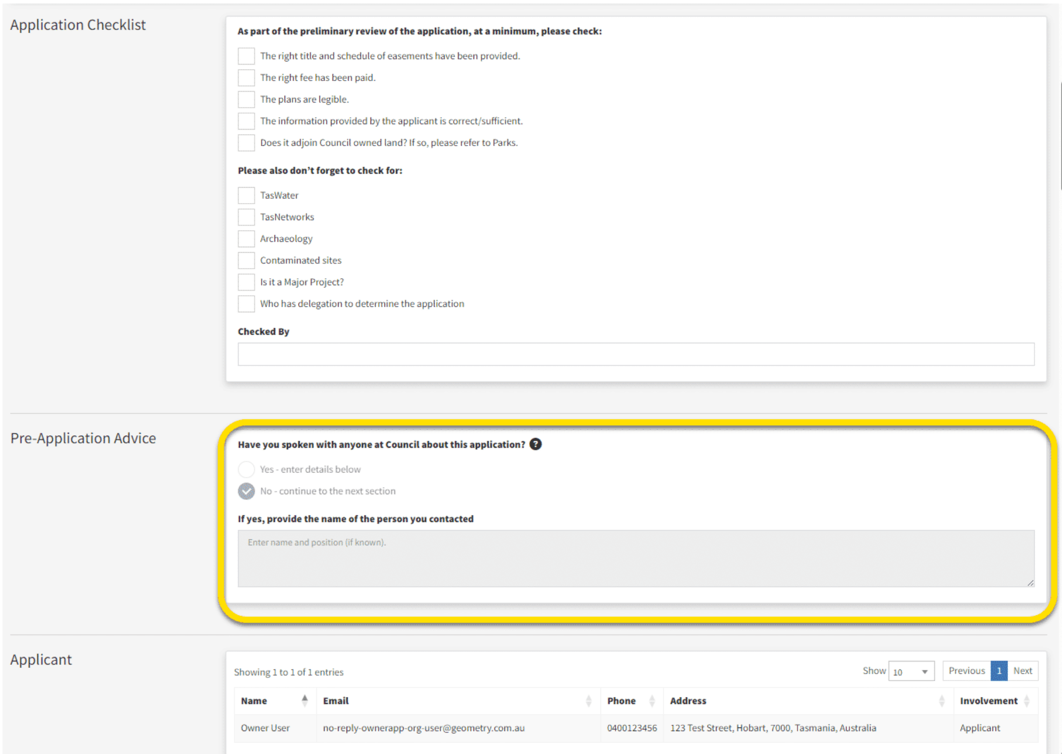
3. The 'Office Use Only' button



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 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.

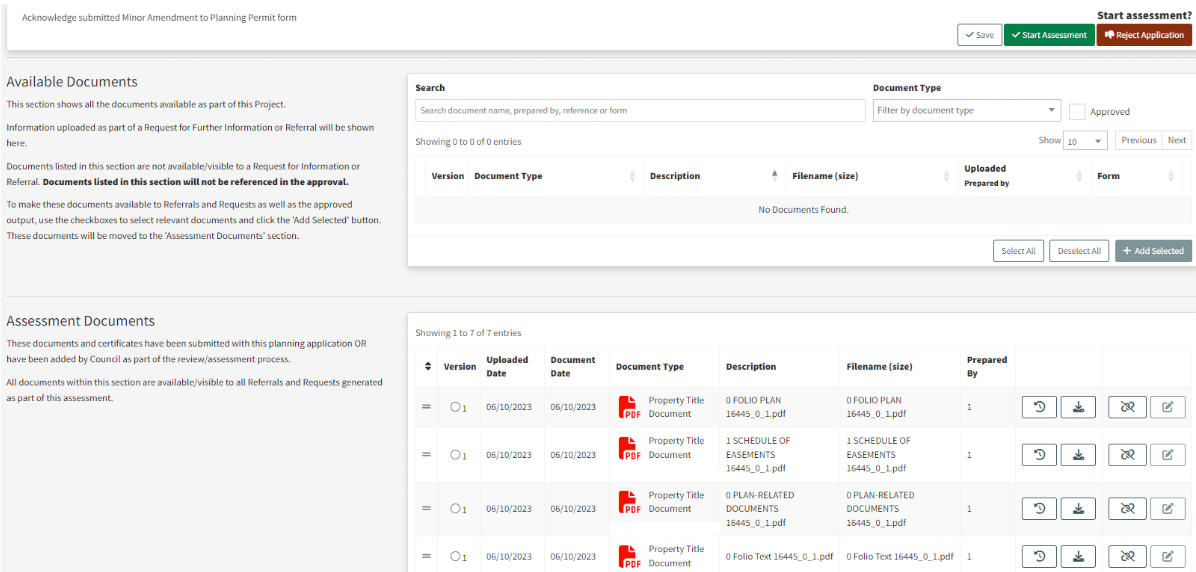
10. Review application details



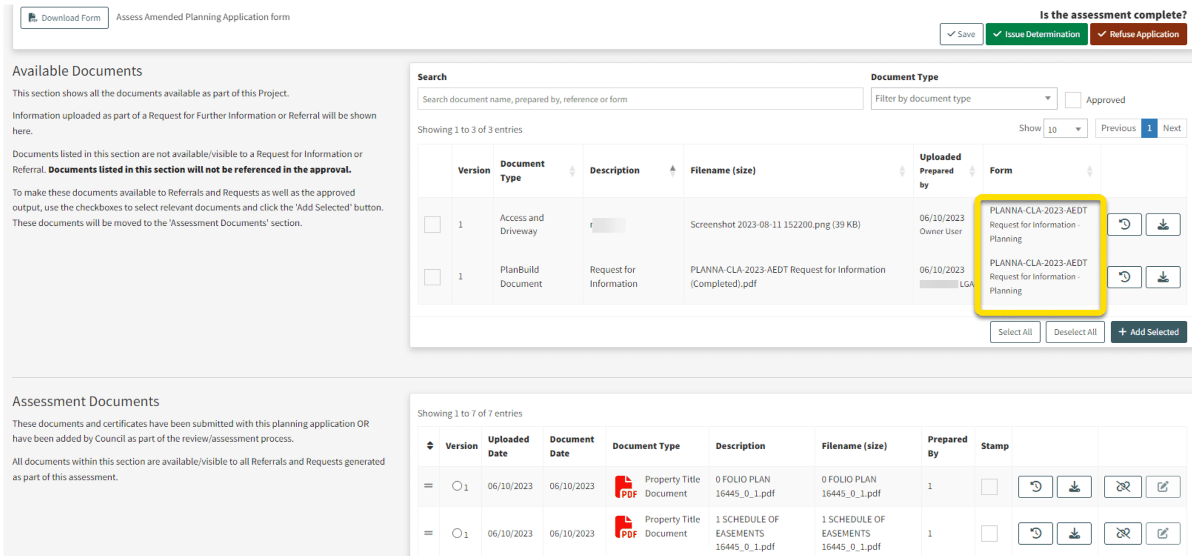
You can review the application details before starting the assessment. The application form sections will look different depending on the type of application.

Any greyed-out sections means editing is not allowed.

11. Available Documents and Assessment Documents



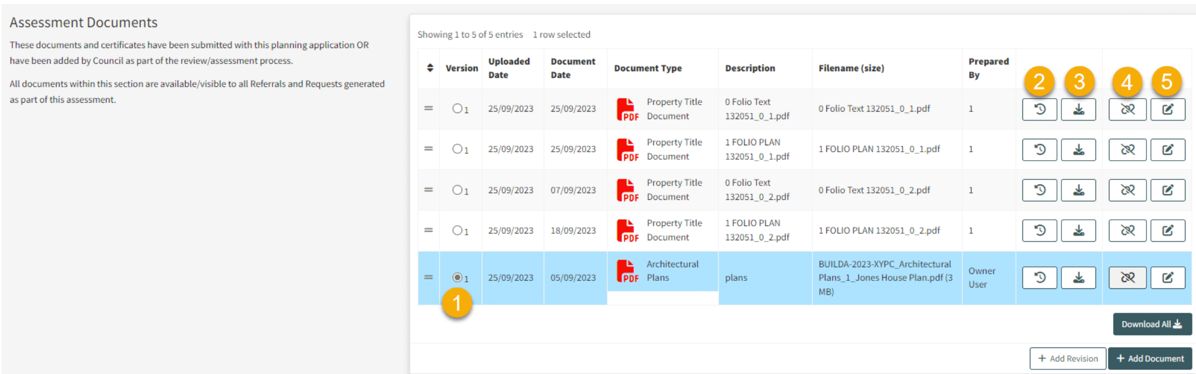
Documents submitted with the application will be available under **'Assessment Documents'** - These are the documents that will form part of the assessment and approval. Admin Officer / Assessment Officer can unlink any irrelevant documents if needed, and those documents will stay under **'Available Documents'** and you can add them back in the future if needed.



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?



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.

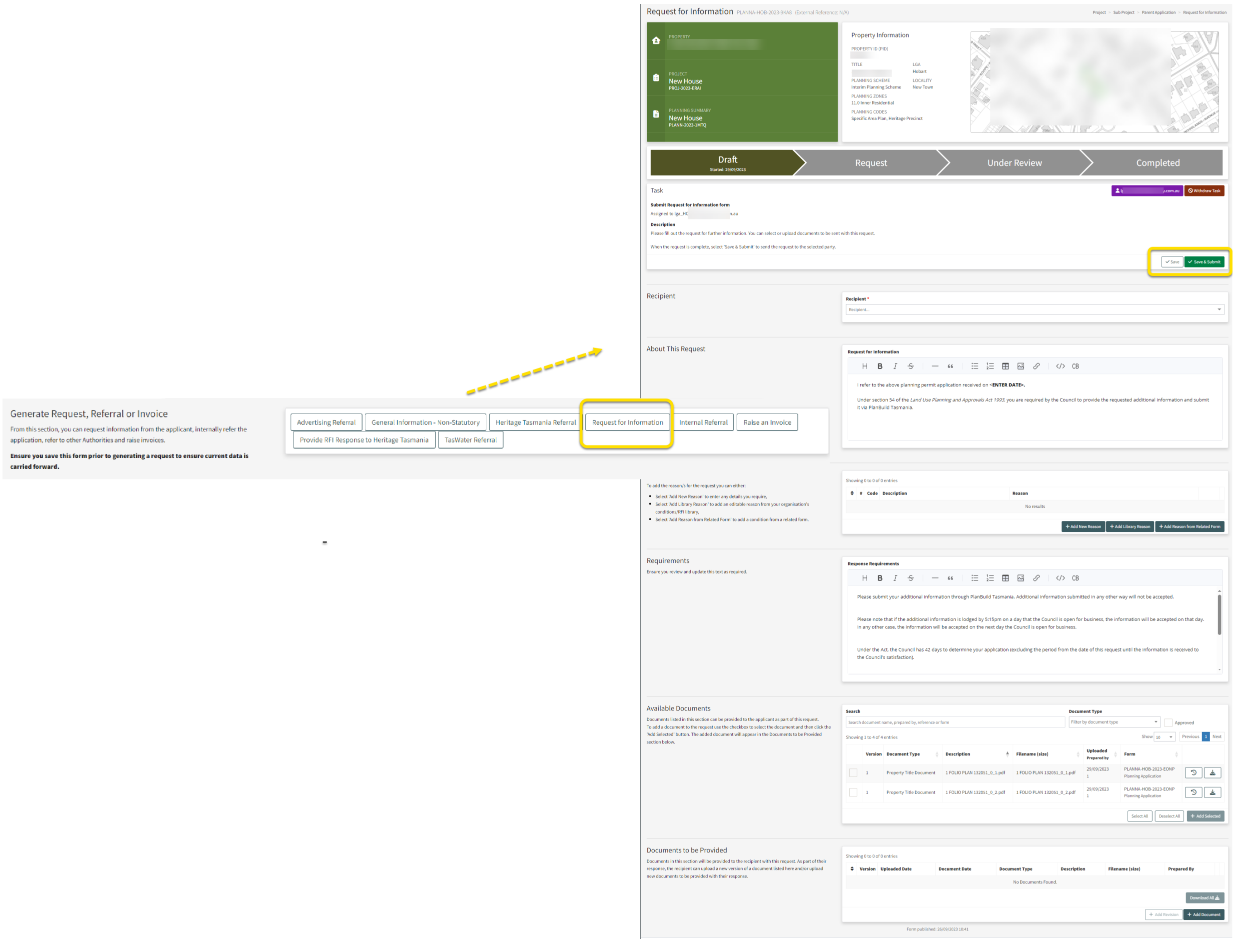
2. You can check any of the previous version of the same document.

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

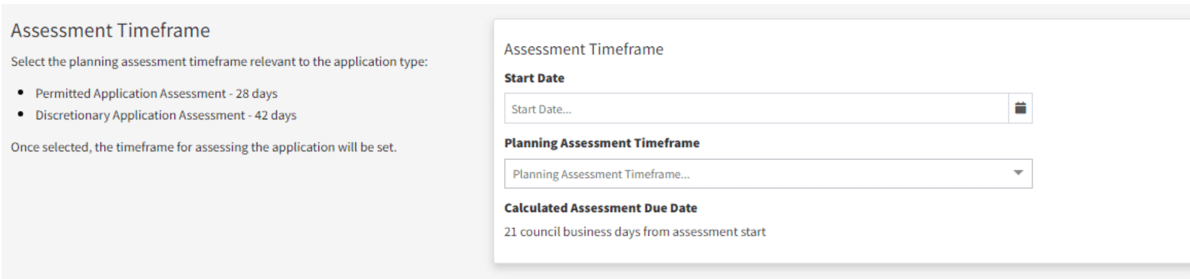


You may request more information before starting the assessment. Use the 'Request for Information' button to open up the form, inset the request using either the '+Add New Reason' button for free typing or '+Add Library Reason' for standard requests that have been saved in the library.

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.

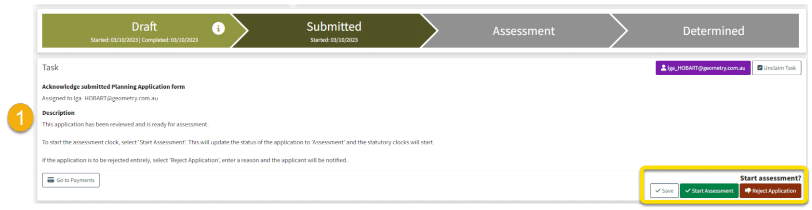
14. Setting Assessment Timeframe

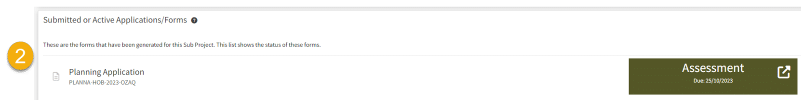


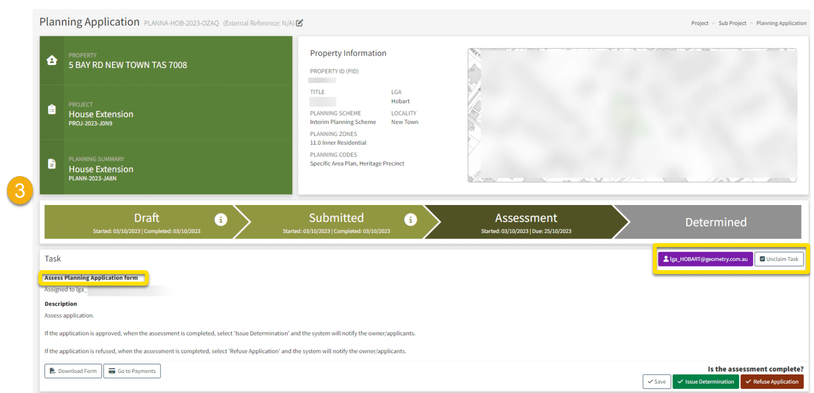
You can set the assessment timeframe at this stage.

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 statuary 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.