



PlanBuild
TASMANIA


Creating and Tracking External Referrals to TasWater

Version 1

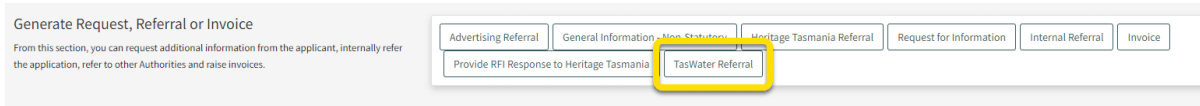


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How do I create a referral to an external authority?



External referrals to TasWater can be created during the 'Submitted' and 'Assessment' statuses of a Planning Application, by using the inbuilt forms within the assessment.

All users with relevant roles (Admin Officers or Assessing Officers, depending on the status) can view the application and the referral buttons, but only the users who have claimed the task are able to create the referral.

Click the 'TasWater Referral' button.

Fill out the Referral Request

Draft (Revised 13/09/2024) | Review | Completed

Task
Submit Planning Referral to TasWater Assessment
 Progress: 0% | Lock Item | Refresh Item

Description
 Provide relevant information below to refer the planning application to TasWater. | Save | Save & Next

Reason for Referral to TasWater
 Use this section to provide any specific comments to TasWater.
 Comments: [Text Area]

Assessment Timeframe
 Select the relevant regulated time frames per the Water and Sewerage Industry Act for Submission to Planning Authority Notice (SPAN).
 Issue Request for Further Information - 1 Business Days
 Issue PAN - 14 Business Days (not specific)

Assessment Timeframe
 Start Date: [Date Picker]
 Number of days: [Input Field] Type: [Business Days / Exclude local public holidays]
 Calculated Assessment Due Date: 14 business days excluding local public holidays from assessment start

Applicant
 To add the Applicant from the parent planning application:
 • Select Add Applicant
 • Select Rating from the drop down list
 • Select the relevant applicant from the list.

Showing 1 to 0 of 0 entries. | Filter | Search | Refresh | Help

Name	Email	Phone	Address	Development
No Applicants Found.				

[Add Applicant] [Add Applicant]

Owner
 Showing 1 to 0 of 0 entries.

Available Documents
 This section shows all the documents within the 'Assessment Documents' section on the Planning Assessment form.
 To refer the documents to TasWater use the checkboxes to select relevant documents and click the 'Add Selected' button. These documents will be moved to the 'Referral Documents' section and will be available for TasWater to view.
 Please ensure that you provide TasWater with:
 • Full and correct search of the Certificate of Title for the property, including the Folio, Tax and Plan, any Schedule of Easements, Comments, Part 5 Agreements, Council Notification or Condition of Transfer.
 • Any applicable plans.
 • Any other information required for the referral.
 Please note you will need to send all required documents to TasWater each time you refer the application to TasWater.

Search | Document Type: [Dropdown] | Filter by Document Type | Approved | Show: 10 | Refresh | Help

Version	Document Type	Description	Filename (click)	Uploaded / Prepared by	Form
1	Request for Information	RFI	Request for Further Information.docx (11 KB)	20/02/2024 Russell Brown	RFI-MCR-2024-0029 Planning Referral

[Select All] [Deselect All] [Add Document]

Referral Documents
 These documents will be provided along with the referral. You can add additional documents by using the 'Add Document' function.

Showing 1 to 0 of 0 entries.

Version	Uploaded Date	Document Type	Description	Filename (click)	Prepared By
No Documents Found.					

[Upload All] [Add Document] [Add Document]

The user needs to state the reason (as the text body of the referral request) and set a timeframe for the referral.

In the 'Applicant' section, click 'Add Applicant' and select the applicant from the drop down.

Add or upload any documents required by the referral authority.

(The form will show the property information, application details and documents provided by the applicant - which are omitted in the image here.)

Provide documents to external agency with the referral

Available Documents
This section shows all the documents within the 'Assessment Documents' section on the Planning Assessment form.
To make these documents available to this referral, use the checkboxes to select relevant documents and click the 'Add Selected' button. These documents will be moved to the 'Referral Documents' section.

Version	Document Type	Description	Filename (size)	Uploaded Prepared by	Form	
<input checked="" type="checkbox"/>	2	Other	Doc. added by applicant	Jones House Plan - Copy.pdf (3 MB)	04/12/2023 Owner User	PLN-BRE-2023-0001 Planning Application

Referral Documents
These documents will be provided along with the referral. You can add additional documents by using the 'Add Document' function.
Please ensure all documentation submitted with the Planning Application is provided to Heritage Tasmania.

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By
No Documents Found.						

In the referral form, all the documents in the 'Assessment Documents' of the Planning application are displayed under 'Available Documents'. If a document you need is not visible, ensure that it has been moved from 'Available Documents' to 'Assessment Documents' on the Planning Application assessment screen.

To add a document to the referral request, go to the 'Available Documents' section, select the document to be added, and then click '+Add Selected'. The documents will then appear under 'Referral Documents'. You will need to send all required documents each time you refer the application. It's important that all documents are sent to ensure it's a valid referral.

You can also add any additional documents using the '+ Add Document' button under 'Referral Documents'.

All documents shown in the 'Referral Documents' section will be included with the referral request.

How do I track the referral process?

Created	Due	Remaining	Owners	Applicants	Address	Sub Project	Action	RFI	Referred	Paused	Assignee	
05/12/2023	03/01/2024	21 days	Owner User	Owner User		New Dwelling	Assess Planning Application form Planning Application (Planning)	✓	✓		Ben Ikin	
05/12/2023	09/01/2024	28 days	Owner User	-		New Dwelling	Assess Request Further information form Request Further information (Planning)				-	

When an Internal or External Referral is outstanding, you will see a tick under the 'Referred' column on the dashboard.

Referral history

Created On	Reference	Referral	Recipient	Current Due Date	Completed Date	Status	
04/12/2023	PLANNA-BRE-2023-0001	Internal Referral		12/12/2023		Assessment	
04/12/2023	PLANNA-BRE-2023-0002	Request for Information			04/12/2023	Completed	
04/12/2023	INV-BRE-2023-0001	Request Payment		25/12/2023	04/12/2023	Paid	
05/12/2023	INV-BRE-2023-0002	Request Payment	-			Request Payment	
07/12/2023	RHT-BRE-2023-0001	Heritage Tasmania - Interest Registered	-		07/12/2023	Completed	
07/12/2023	PLANNA-BRE-2023-0003	Referral of RFI Response to Authority	-		07/12/2023	Completed	

In 'My Task List' and 'Organisation Tasks' sections on the dashboard, users can check the referral history of an application by clicking the Referrals button on the right.

Details of all request for payments, internal and external referrals raised would all be shown in this list.

Referral record within the asesment

Download Form | Go to Payments | Assess Planning Application form

Is the assessment complete?
Save | Issue Determination | Refuse Application

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 Referral | Request for Information | Internal Referral | Invoice
Provide RFI Response to Heritage Tasmania | TasWater Referral

Requests and/or Referrals
Any requests, referrals or invoices that have been created will be displayed here.

Showing 1 to 10 of 11 entries

Created On	Reference	Referral	Recipient	Current Due Date	Completed Date	Status	
04/12/2023	PLANNA-BRE-2023-0001	Internal Referral		12/12/2023		Assessment	Pop-out
04/12/2023	PLANNA-BRE-2023-0002	Request for Information			04/12/2023	Completed	Pop-out
07/12/2023	RHT-BRE-2023-0001	Heritage Tasmania - Interest Registered	-		07/12/2023	Completed	Pop-out
07/12/2023	PLANNA-BRE-2023-0003	Referral of RFI Response to Authority	-		07/12/2023	Completed	Pop-out
07/12/2023	PLANNA-BRE-2023-0004	Submit Request	-		07/12/2023	Further Information Request	Pop-out
07/12/2023	PLANNA-BRE-2023-0005	Review RFI Response	-	02/01/2024		Review	Pop-out

Advertising
Generate and manage advertising, including viewing any lodged representations.

Start advertising the Planning application by clicking the "Start Advertising" button

Start Advertising

In the Assessment screen, the referral records can be found under 'Request and / or Referrals'.

You can view the any related referral by clicking on the 'Pop-out' button on the right.

Search for a referral

Task Search

Task Administration

referral to TasWater

Sub Project Type | Department | Select Assignee

Filter by Due Date

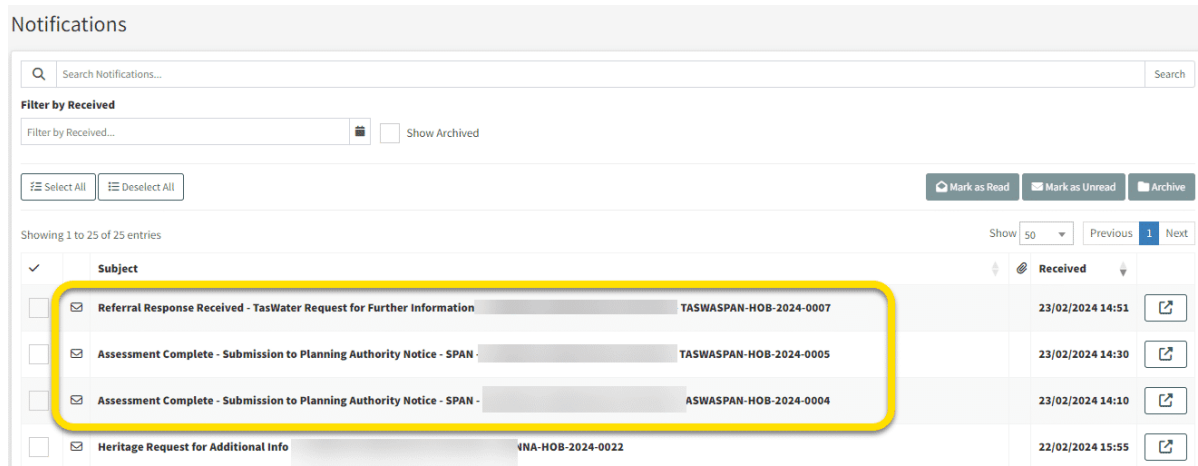
Showing 1 to 3 of 3 entries

Created	Due	Reference	Owners	Applicants	Address	Project	Sub Project	Action	Sub Project Type	Department	Assignee
23/02/2024	24 days	TASWASPAN-HOB-2024-0006	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	TasWater Development Services	Pop-out
25/02/2024	22 days	TASWASPAN-HOB-2024-0009	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	TasWater Development Services	Pop-out
26/02/2024	22 days	TASWASPAN-HOB-2024-0010	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	TasWater Development Services	Pop-out

Users can use the 'Task Search' function to look up a referral task.

Select 'Tasks' in the Search dropdown. On the Task Search screen, search with the referral task name.

How do I know when TasWater has provided a response?

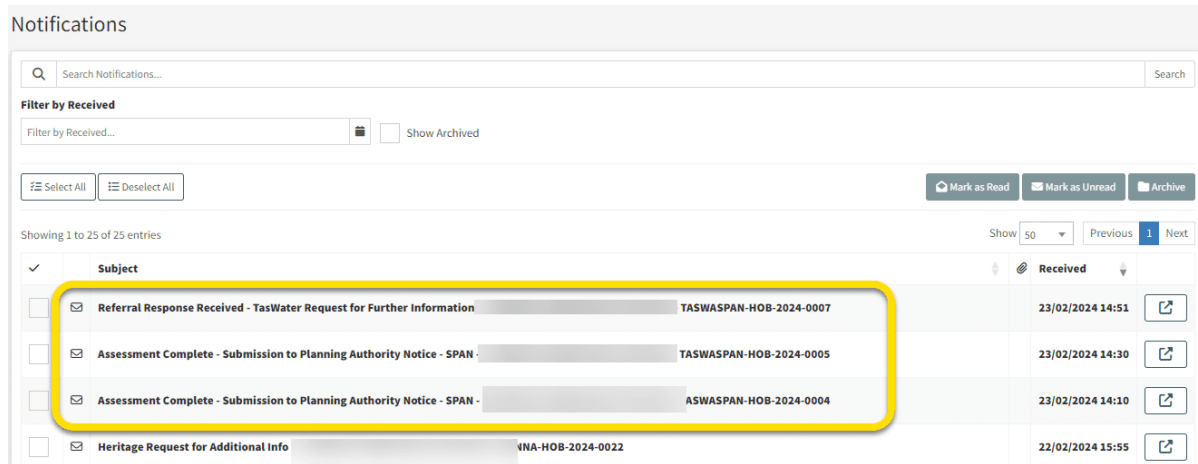


When the response is received, a notification will be sent to all users in the relevant department that have been set up with the 'Referral Response Notification' role. (The role could be set up with a user account opened with a group email address, depending on the business process.)

Appropriate business process should be set up to make sure these users check the notifications when they are available and make the original referral sender aware of them.

Documentation that has been uploaded by TasWater as part of a response will be available to the relevant assessment automatically via the 'Available Documents' section. Users just need to add them to 'Assessment Documents' in order to include them when sending the Request for Further Information to the applicant, as well as including them in the Document Pack of the outcome.

Referral outcomes



The possible outcomes for a TasWater Referral are -

- SPAN issued - TasWater does not object to the proposed development and no conditions are imposed.
- SPAN issued - TasWater imposes the condition on the permit for the application.
- Request Additional information (RAI) - TasWater requires additional information before considering to issue a SPAN.

The image shows examples of notification when there is a response from TasWater. You can enter the referral summary page directly using the link in the notification.

Sub Project page

Submitted or Active Applications/Forms

The below are the applications/forms that have been generated for this Sub Project. This list shows the status of these forms, and the relevant outstanding tasks if there are any. To view the application, select the relevant row and it will open the summary page. Please note that you will only be able to view the information that is relevant to your role and project stages (For example, an applicant would not be able to view the details of an application that is under the Assessment stage).

Planning Application PLN-HOB-2024-0002	Assessment Started: 02/02/2024
TASWASPAN-HOB-2024-0011 - Submission to Planning Authority Notice - SPAN (26/02/2024)	Completed
TASWASPAN-HOB-2024-0012 - Submission to Planning Authority Notice - SPAN (26/02/2024)	Completed
TASWASPAN-HOB-2024-0013 - TasWater Request for Further Information (26/02/2024)	Further Information Requested

Users will also be able to see the statuses of the referrals in the Sub Project page under the 'Submitted or Active Applications/Forms' section.

If TasWater has issued a SPAN, the referral status would be stated as 'Completed'.

If TasWater requires additional information, the referral status here would show 'Further Information Requested'.

Assessment screen

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 10 of 20 entries Show 10 Previous 1 2 Next

Version	Document Type	Description	Filename (size)	Uploaded Prepared By	Form
<input type="checkbox"/>	PlanBuild Document	Submission to Planning Authority Notice - SPAN	TASWASPAN-HOB-2024-0011 Submission to Planning Authority Notice - SPAN (Completed).pdf	26/02/2024	TASWASPAN-HOB-2024-0011 Submission to Planning Authority Notice (SPAN)
<input type="checkbox"/>	PlanBuild Document	Submission to Planning Authority Notice - SPAN	TASWASPAN-HOB-2024-0012 Submission to Planning Authority Notice - SPAN (Completed).pdf	26/02/2024	TASWASPAN-HOB-2024-0012 Submission to Planning Authority Notice (SPAN)
<input type="checkbox"/>	PlanBuild Document	TasWater Request for Further Information	TASWASPAN-HOB-2024-0013 TasWater Request for Further Information (Rejected).pdf	26/02/2024	TASWASPAN-HOB-2024-0013 Submission to Planning Authority Notice (SPAN)

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 1 of 1 entries

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By	Stamp
1	20/02/2024	19/02/2024	Request for Information	RFI	Request for Further Information.docx (11 KB)		

Stamp Date
Stamp Date... Download All

Leave the Stamp Date blank to have the system apply the date at the time of stamping

+ Add Revision + Add Document

Users can enter the referral summary page to download the documents if needed, however, the SPAN and RAI documents are already added to 'Available Documents' automatically in the Assessment screen when the response comes in.

In the Assessment screen, the user needs to select the documents from 'Available Documents', add them to 'Assessment Documents' manually for them to be included in the assessment's Document Pack (visible to applicant).

Add TasWater's request into the RFI

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.

Version	Document Type	Description	Filename (size)	Uploaded Prepared By	Form
<input type="checkbox"/>	PlanBuild Document	Submission to Planning Authority Notice - SPAN	TASWASPAN-HOB-2024-0011 Submission to Planning Authority Notice - SPAN (Completed).pdf	26/02/2024	TASWASPAN-HOB-2024-0011 Submission to Planning Authority Notice (SPAN)
<input type="checkbox"/>	PlanBuild Document	Submission to Planning Authority Notice - SPAN	TASWASPAN-HOB-2024-0012 Submission to Planning Authority Notice - SPAN (Completed).pdf	26/02/2024	TASWASPAN-HOB-2024-0012 Submission to Planning Authority Notice (SPAN)
<input type="checkbox"/>	PlanBuild Document	TasWater Request for Further Information	TASWASPAN-HOB-2024-0013 TasWater Request for Further Information (Rejected).pdf	26/02/2024	TASWASPAN-HOB-2024-0013 Submission to Planning Authority Notice (SPAN)

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.

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By	Stamp
1	20/02/2024	19/02/2024	Request for Information	RFI	Request for Further Information.docx (11 KB)		

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.

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

Provide RFI Response to Heritage Tasmania | **TasWater Referral**

You can include any RAI documents from TasWater when you send out a Request for Further Information document to the Applicant. To do so:

1. Navigate to the Assessment screen (easiest via the Sub Project page).
2. Find the Request for Further Information documents attached by TasWater under the 'Available Documents' section.
3. Select the item and use the '+ Add Selected' button to add that to the 'Assessment Documents' section.
4. Create the Request for Information request to applicant using the button in the 'Generate Request, Referral or Invoice' section.

Fill out the Request for Information

In the form, select the recipient (usually the applicant), provide details of the request in 'About this Request'.

List out 'information requested' by adding any pre-saved request from the Organisation's condition library or add new ones using the '+Add New Reason' button. List out any requirements apply to the request.

There may be pre-filled text in the sections mentioned in the above, make sure you review and update these texts as required.

In the 'Available Documents' section, select any documents that you would like to attach to the request, such as the Request for Additional Information document from TasWater. Make sure they are added to the 'Documents Provided with this Request' section.

Click 'Save & Submit' at the top right corner when you are ready to send out the request.

Review the form in the pop-up screen and confirm.

Review the response

Request for Information - Planning PLANNA-HOB-2024-0025 (External Reference: N/A)

Project > Sub Project > Parent Application > Request for Information - Planning

Draft (Started: 28/02/2024 | Completed: 28/02/2024) → **Request** (Started: 28/02/2024 | Completed: 28/02/2024) → **Under Review** (Started: 28/02/2024 | Due: 13/03/2024) → **Completed**

Task
Assigned to: kimb@hobartcity.com.au
Acknowledge response
Assigned to: kimb@hobartcity.com.au
Description
Please review the response to the request for information. If further information is still required, a new request can be raised using the 'Request Information' button on the parent form.
[Download Form](#) [Save](#) [Save & Acknowledge](#) [Unclaim Task](#) [Withdraw Task](#)

Information Requested
Showing 1 to 1 of 1 entries

#	Code	Description	Reason
1	BLD-RFI-1	Building Surveyor Certification Required	BLD-RFI-1 Please ensure your building surveyor is made aware of any changes that relate to your Certificate of Likely Compliance as they may need to be re-certified before submitting your additional information to Council.

Response comments
Response provided by recipient.

Documents
This section shows documents that were provided to the applicant as part of the request, as well as any new revisions or additional documents uploaded by the recipient.
Upon acknowledgement of this response, any new documents or revisions will be made available on your assessment screen.

Version	Uploaded Date	Document Date	Document Type	Description	Filename (size)	Prepared By
1	28/02/2024	28/02/2024	Request for Information	Bushfire plan	Response to RFI.docx (11 KB)	Owner User

[Download All](#)

When a RFI response from the applicant is available, the Assessing Officer (who currently have claimed the task) will receive a notification and have the task in 'My Task List'.

Enter the RFI form, download the response by clicking 'Download Form', and download any documents attached by the applicant.

Note: Assessment Clock Activity

Assessment Clock Activity

This section displays information about the assessment clock for this application. You can also use this section to manually pause/resume the assessment clock.

Application Valid Date is the date that the application was deemed valid.

Days Clock Paused is the total number of days that the assessment clock has been paused for during the course of the assessment.

Active Pause Events provides the list of currently active clock pause events.

Pause Events History provides a summary of previous events that have paused the assessment clock, including a request for information or manual clock pause.

To manually 'pause' the assessment clock:

- Select 'Pause Clock'.
- Use the 'Manual Pause Start Date' option to set the effective date for the clock pause. This can be any date between the current date and the 'Application Valid Date'.
- Use the 'Pause Reason' option to select the relevant reason from the list of available reasons.
- Confirm by selecting 'Pause Clock'.

To manually 'resume' the, manually paused, assessment clock:

- Select 'Resume Clock'.
- Use the 'Manual Resume Date' option to select the date that the manual pause event ended. This can be the current date or any date since the manual clock was paused.
- Confirm by selecting 'Resume Clock'.

Automatic clock pause and resume:

- A request for information (RFI) sent to the applicant (or other party) via PlanBuild Tasmania will automatically pause the assessment clock.
- The assessment clock will be resumed automatically upon acknowledgment of the applicant's response by the assessor.
- If the assessor has deemed the RFI response satisfactory, the assessment clock will be resumed effective of the date of RFI response.
- If the assessor deems the response unsatisfactory, an additional RFI should be raised prior to selecting 'Not Satisfactory'.

Notes:

- An automatic pause (via RFI) cannot be resumed manually, only via the recipient's response to the request in the system.
- A manual pause can only be resumed manually.

▲ Assessment Clock Paused

Application Valid Date
15/04/2024

Days Clock Paused
0

Active Pause Events

Showing 1 to 1 of 1 entries Show 10 Previous 1 Next

Start	Reason	Days Paused
18/04/2024	PLANNA-HOB-2024-0015 - Request for Information	0

Pause Events History

Showing 0 to 0 of 0 entries Show 10 Previous Next

Start	End	Reason	Days Paused
No Pause Event History.			

⏸ Pause Clock
▶ Resume Clock

The assessment clock will stop once the Request for Information is sent out and will resume automatically when the Assessing Officer confirms 'Satisfied' with the response. Users should not click any of the 'Satisfied' or the 'Unsatisfied' button until they have got all responses required and are able to determine whether the RFI was either 'satisfied'. If not satisfied, users can raise a secondary RFI addressing all outstanding points, prior to closing selecting 'not satisfied'. This would keep the statutory clock paused.

On the Assessment Screen, the 'Assessment Clock Activity' section allows the Assessing Officer to stop the clock manually using the 'Pause Clock' button and 'Resume Clock' manually when they are satisfied with the responses, this can help to avoid any gaps in-between.

Current clock status and clock pausing events involved throughout the assessment process are also recorded under in this section.

Send the response to TasWater

Planning Referral to TasWater TASWASPAN-HOB-2024-0016 (External Reference: N/A) Project > Sub Project > Parent Application > Planning Referral to TasWater

Draft
Started: 27/02/2024

Review

Completed

Task [User] [Unclaim Task] [Withdraw Task]

Submit Planning Referral to TasWater form

Assigned to

Description
Provide relevant information below to refer the planning application to TasWater.

[Save] [Save & Send]

Related Form
Use this section to select the Permit, Certificate or Approval that this form relates to, or will affect.
For example, if you are making an amendment to a Permit, please ensure that you have selected the relevant Permit prior to progressing.
If this section is left blank, this form or application will not be associated with a previous approval.

Select related form
Select related form...

Reason for Referral to TasWater
Use this section to provide any specific comments to TasWater.

Comments

Navigate back to the assessment screen and head to the 'Generate Request, Referral or Invoice' section. Create the 'TasWater Referral' form - the same form used for the initial referral request.

Do not select any related form if you are sending TasWater a response for RAI.

In the 'Reason for Referral to TasWater' section, provide details of the referral. You should also include any relevant reference number of the initial RAI for TasWater's reference.

Select Assessment Timeframes

Under Assessment Timeframe, select from the drop down for the referral regulated time frames:

- TasWater SPAN - Initial Referral – 14 Business Days
- TasWater SPAN - Response to Additional Information - 7 Business
- DaysTasWater Consent to Register Legal Documents Initial Referral - 10 Business Days
- TasWater Response to Additional Information - 5 Business Days

Add Applicant from the drop down.

Upload documents

The screenshot displays a web interface for document management. It is divided into two main sections: 'Available Documents' and 'Referral Documents'.

Available Documents: This section includes a search bar, a 'Document Type' filter, and a checkbox for 'Approved'. Below these is a table with one entry:

Version	Document Type	Description	Filename (size)	Uploaded Prepared by	Form
1	Request for Information	RFI	Request for Further Information.docx (11 KB)	20/02/2024 Russell Dobie	RHT-HOB-2024-0009 Heritage Review

Buttons for 'Select All', 'Deselect All', and '+ Add Selected' are located below the table.

Referral Documents: This section shows a table with the following columns: Version, Uploaded Date, Document Date, Document Type, Description, Filename (size), and Prepared By. The table is currently empty, with the message 'No Documents Found.' displayed below it. Buttons for '+ Add Revision' and '+ Add Document' are at the bottom right.

Add any relevant documents from 'Available Documents' to 'Referral Documents'.

Upload the response and documents from the response which were downloaded in the previous step.

Send out the response when ready.