



PlanBuild
TASMANIA


Acknowledge a new submitted Application - Building and Plumbing

Version 1



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Introduction

All building and plumbing related applications share similar workflows in PlanBuild Tasmania. In this assessment guide, we are using a Building Permit application assessment to illustrate the features and assessment steps in PlanBuild Tasmania, but these principals apply regardless of the application type.



1. Find the Task

After the applicant has submitted a building or plumbing related application, it will be available to be seen on the PlanBuild Dashboard by users with the 'Admin Officer' role and 'Building' and/or 'Plumbing' department(s).

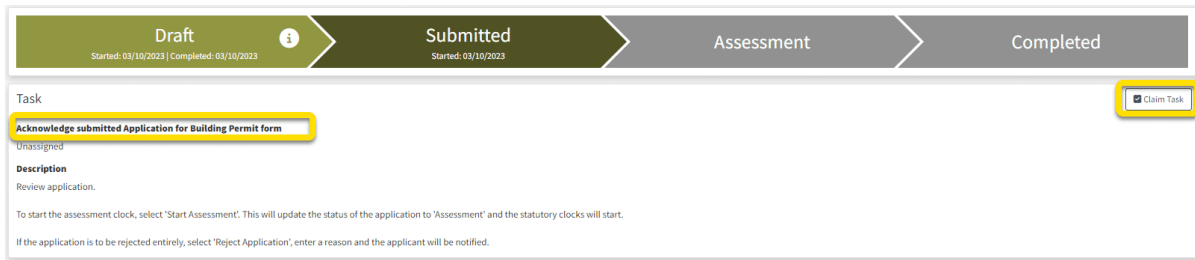
The screenshot shows the PlanBuild Dashboard interface. At the top, there is a 'Home' header and a '+ Create project' button. Below this is a 'Task Filter' section with a search bar and checkboxes for 'Has Outstanding RFI' and 'Has Outstanding Referral'. A notification bubble with the number '5' is next to the search bar. The main content is divided into two sections: 'My Task List' and 'Organisation Tasks'. Both sections show a table of tasks with columns for 'Created', 'Due', 'Remaining', 'Owners', 'Applicants', 'Address', 'Sub Project', 'Action', 'RFI', and 'Referred'. The 'Organisation Tasks' section also includes an 'Assignee' column. Numbered callouts are placed over the dashboard: '1' is over the 'Organisation Tasks' header, '2' is over the search bar, '3' is over the 'Action' column, '4' is over the 'Pop out' button, and '5' is over the notification bubble.

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'.



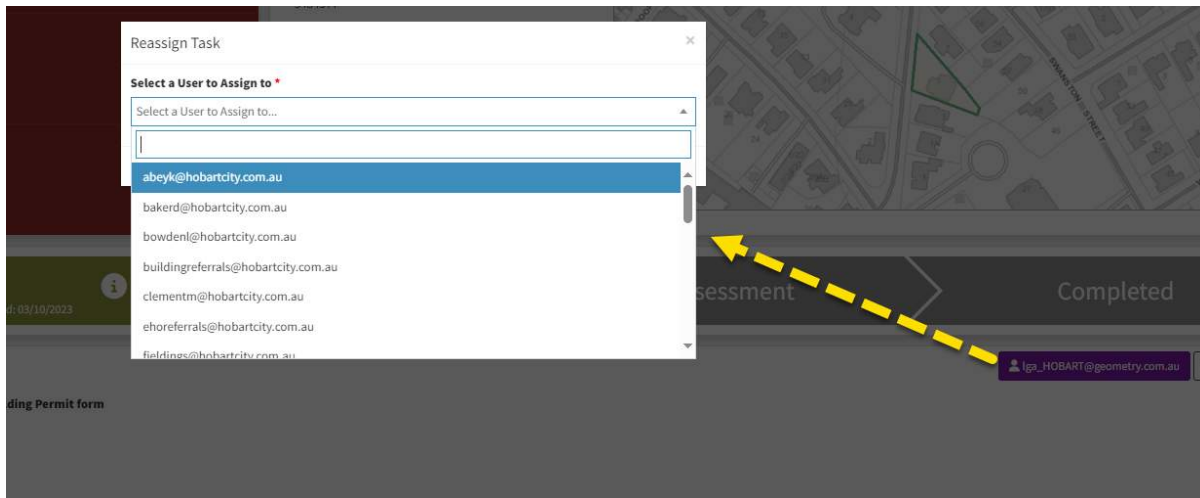
2. Claim Task



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.

3. 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.

4. Navigate to other applications/documents

Application for Building Permit BUILDA-HOB-2023-RTMO (External Reference: N/A) [🔗](#)

PROPERTY
[Redacted] 08

PROJECT
New home
PROJ-2023-Z6DE

BUILDING SUMMARY
New home
BUILD-2023-923I

Property Information

PROPERTY ID (PID)
5 [Redacted]

TITLE [Redacted] LGA
Hobart

PLANNING SCHEME LOCALITY
Interim Planning Scheme New Town

PLANNING ZONES
11.0 Inner Residential

PLANNING CODES
Specific Area Plan, Heritage Precinct

Draft [i](#) **Submitted**

Started: 03/10/2023 | Completed: 03/10/2023

Started: 03/10/2023

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

By clicking the 'Building/Plumbing 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.

5. View Payment

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

Submitted Started: 25/09/2023

Task

Acknowledge submitted Application for Building Permit form
Assigned to lga_HOBART@geometry.com.au

Description
Review application.

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

PLANINA-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	PLANINA-CLA-2023-TMOC	PLANINA-CLA-2023-TMOC-Planning Application	03245314	Owner User	30 GORDONS HILL RD ROSBY PARK TAS 7038	\$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.

6. 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.

7. 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

PROPERTY: 30 GORDONS HILL RD ROSNY PARK TAS 7018

PROJECT: New house

PLANNING SCHEME: New house

PROPERTY INFORMATION: TITLE, LGA, CLASSES, PLANNING SCHEME, LOCALITY, PLANNING ZONES, PLANNING CODES

Request Payment | Awaiting Payment | Acknowledge | Paid

Task: Submit Request Payment form

Recipient: [Dropdown]

Details of Request: [Text Area]

Invoice: Showing 0 to 0 of 0 entries

Name	Ledger Code	Base (\$)	Units	Per Unit (\$)	Sub Total (\$)	GST (\$)	Total (\$)
No 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.

8. Payment method - Office Use Only

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

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 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 to Council.

9. Review application details

Acknowledge submitted Application for Building Permit form

Start assessment?
Save Start Assessment Reject Application

ABN
35 264 254 198

Description of Work

Commercial or Residential *
Residential

Type of Work *
Alteration

Building Code Classifications
Building Code Classifications...

Description of Work
oklytr

Value of Work

This information has been populated from the associated Certificate of Likely Compliance

Value (GST inclusive)	Price	No. of dwelling units
1000	Estimate	

Other Details

Area: m²

Existing building floor area	New floor area

Material:

Floor	Walls	Roof	Frame
Floor...	Walls...	Roof...	Frame...

Documents and Certificates Provided

The following specified documents and certificates are provided with this application.

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.

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.

Acknowledge a new submitted Application - Building and Plumbing

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 15:22:00.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?

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				
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				

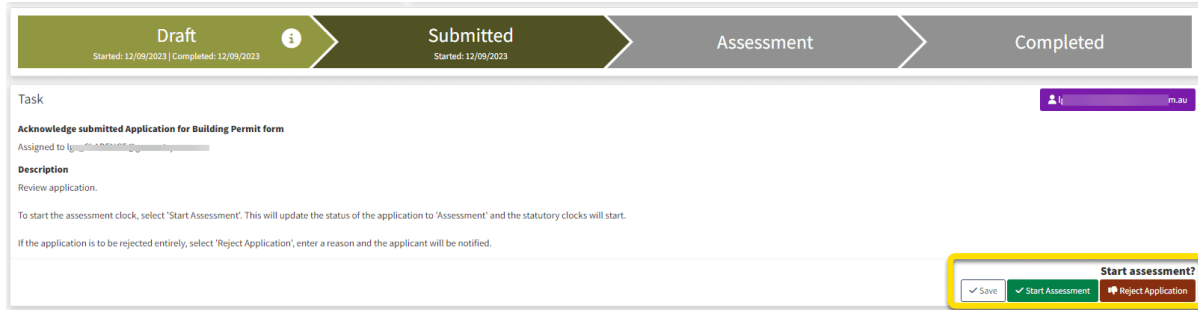
Download All

+ 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. Progress the application to the assessor



When you are ready to progress the application, click 'Start Assessment' 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).