



PlanBuild
TASMANIA


Creating and Tracking External Referrals to Heritage Tasmania

Version 1

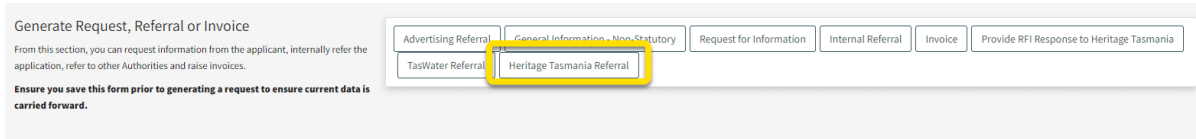


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How do I create a referral to Heritage Tasmania?



External referrals to Heritage Tasmania 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, but only the users who have claimed the task are able to create a referral.

Click the 'Heritage Tasmania Referral' button.

Fill out the Referral Request

The screenshot displays a web form titled "Submit Referral to Heritage Tasmania Form" with a progress bar at the top showing "Draft" (selected), "Review", and "Completed" stages. The form includes several sections: "Reason for Referral to Heritage Tasmania" with a "Comments" text area; "Applicant" and "Owner" sections with search filters for Name, Email, Phone, Address, and Status; "Proposed Use or Development Description" with a "What is the reason for your planning application?" section containing radio button options; "Available Documents" with a search bar and a table with columns for Version, Document Type, Description, File name (link), Upload date, and Form; and "Referral Documents" with a table with columns for Version, Upload date, Document Date, Document Type, Description, File name (link), and Prepared By. The form is published on 01/10/2023 10:53.

The user is required to state the reason (as the text body of the referral request) for the referral and add an applicant (select from the drop down). Users can 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 Heritage Tasmania with the referral

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 contains a search bar, a 'Document Type' filter, and a table of documents. A checkbox in the first row is highlighted with a yellow box. Below the table, a '+ Add Selected' button is also highlighted with a yellow box.

Version	Document Type	Description	Filename (size)	Uploaded Prepared by	Form
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: This section shows a table with columns for Version, Uploaded Date, Document Date, Document Type, Description, Filename (size), and Prepared By. It currently displays 'No Documents Found.' A '+ Add Document' button is highlighted with a yellow box.

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 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?

Organisation Tasks ?

Showing 1 to 10 of 11 entries Show 10 Previous 1 2 Next

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

Referrals

Showing 1 to 10 of 11 entries Show 10 Previous 1 2 Next

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

Heritage Review | Request Extension to Building Permit | Building Permit (Form 18)

In the '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 assessment

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
04/12/2023	PLANNA-BRE-2023-0002	Request for Information			04/12/2023	Completed
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
07/12/2023	PLANNA-BRE-2023-0004	Submit Request	-		07/12/2023	Further Information Request
07/12/2023	PLANNA-BRE-2023-0005	Review RFI Response	-	02/01/2024		Review

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

Home | Search | Tasks | Properties | Projects | Sub Projects | Applications | Payments | Help

Task Search

Task Administration

request for information

Sub Project Type | Department | Select Assignee

Filter by Due Date

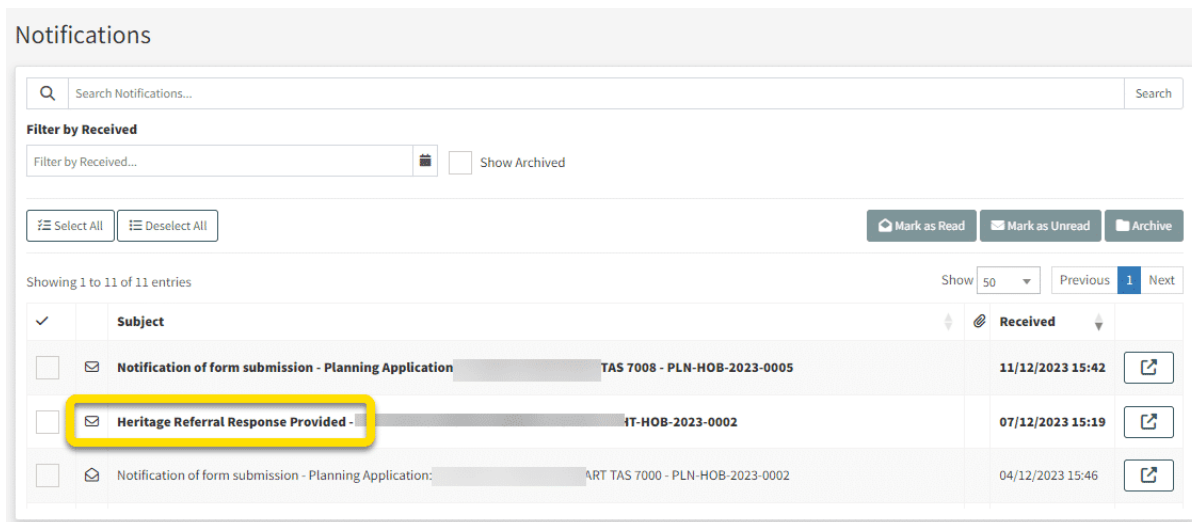
Showing 1 to 1 of 1 entries

Created	Due	Reference	Owners	Applicants	Address	Project	Sub Project	Action	Sub Project Type	Department	Assignee
08/12/2023		PLANNA-BRE-2023-0008	Jane Designer			Cc		Request for Information (Planning) Submit Request for Information form	Planning		Building Referrals

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 such as 'Heritage Review'.

How do I know when Heritage Tasmania has provided a response?

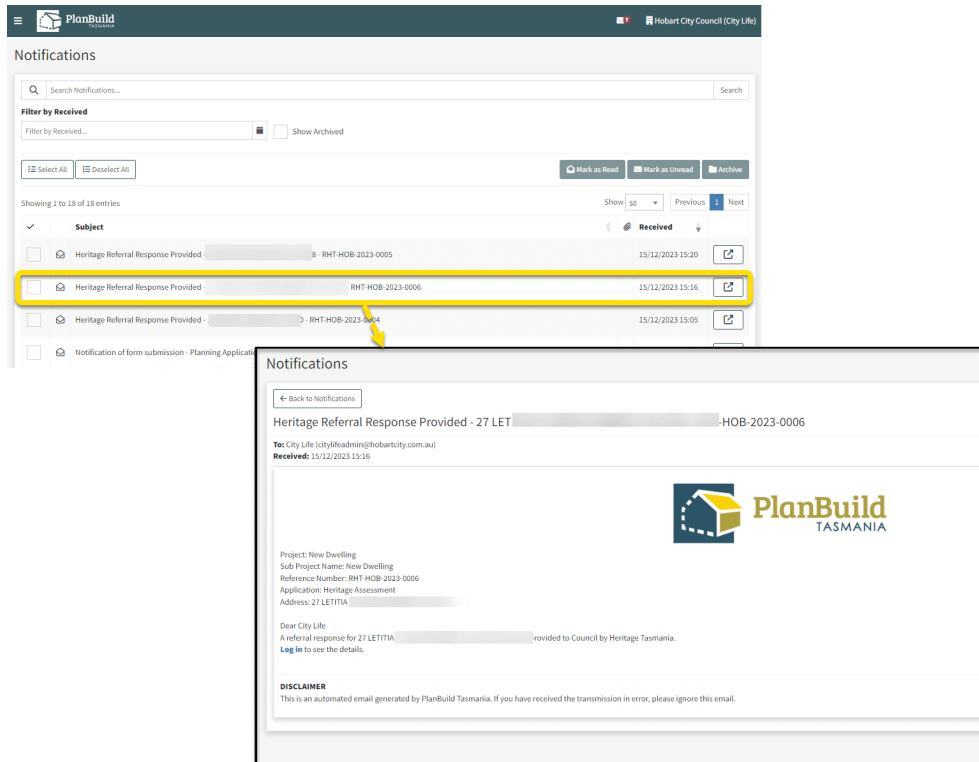


When the response is received, a notification will be sent to all users in the relevant department that have been set up with the 'Referral Response Notification' role. (The role could be set up with a user account opened with a group email address, depending on the business process.)

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 Heritage Tasmania 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 included them in the Document Pack of the outcome.

Referral outcomes



The possible outcomes for a Heritage Tasmania Referral are –

- Heritage Tasmania registers interest to the application.
- Heritage Tasmania registers interest and requests further information in response to the referral.
- Heritage Tasmania states that they have no interest to this application.

Refer to the image for an example of a notification received when there is a response from Heritage Tasmania. 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).

The screenshot displays a user interface for a sub-project. At the top, there is a header for 'Planning Application' with ID 'PLN-HOB-2024-0002' and a '7 related' indicator. To the right, a dark green box indicates the 'Assessment' stage with a due date of '04/03/2024'. Below this, a list of applications is shown. The first entry is 'PLANNA-HOB-2024-0004 - Internal Referral (09/02/2024)' with a status of 'Assessment'. The second entry is 'RHT-HOB-2024-0005 - Heritage Tasmania - Interest Registered (19/02/2024)' with a status of 'Completed'. Below this, separated by 'Or', is the third entry: 'RHT-HOB-2024-0008 - Heritage Tasmania - No Interest (20/02/2024)' with a status of 'Completed'. The 'Completed' labels for the second and third entries are highlighted with yellow boxes.

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

Note that no matter what the outcome is, the referral status would be stated as 'Completed' as it only means the task of getting a response from Heritage Tasmania has been completed.

If Heritage Tasmania registers their interest to the Planning Application, it would state 'Interest Registered' in the heading, otherwise it would state 'no interest'.

The User needs to open up the item by clicking on the 'pop-out' button to check if there is a Request for Information letter available in the 'Completed Document Pack' for download and action, if Heritage Tasmania has registered their interest.

When Heritage Tasmania Request for Further Information

The screenshot displays a workflow interface for Heritage Tasmania. At the top, a progress bar shows three stages: 'Draft' (Started: 20/02/2024 | Completed: 20/02/2024), 'Review' (Started: 20/02/2024 | Completed: 20/02/2024), and 'Completed'. Below this, the main content area is titled 'Heritage Tasmania - Interest Registered'. It features a 'Completed Summary' section with a 'Download PDF' button and a 'Completed Document Pack' section with a 'Download All' button. A table below the document pack lists the documents:

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

On the Referral Summary page, a user can download the referral outcome (the PDF file in the 'Completed Summary' section), and the Request for information document if there is one.

Add Heritage Tasmania's request into the RFI

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

1 **Assessment**
RHT-HOB-2024-0009

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
1	Plan-Build Document	Heritage Tasmania - Interest Registered	RHT-HOB-2024-0009 Heritage Tasmania - Interest Registered (Completed).pdf	20/10/2024 Russel Doble	RHT-HOB-2024-0009 Heritage Review
1	Request for Information	RFI	Request for Further Information.docx (1 KB)	20/10/2024 Russel Doble	RHT-HOB-2024-0009 Heritage Review

3 **+ 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 0 to 0 of 0 entries

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

Stamp Date: [] **Download All**

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

+ Add Referral **+ Add Document**

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 Tasmania Referral | **Request for Information** | Internal Referral | Invoice

Provide RFI Response to Heritage Tasmania | TasWater Referral

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You can include any Request for Further Information documents from Heritage Tasmania when you send out a RFI 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 Heritage Tasmania 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

Please submit your additional information through PlanBuild Tasmania. Additional information submitted in any other way will not be accepted.

Please note that if the additional information is lodged by 5:15pm on a day that the Council is open for business, the information will be accepted on that day. In any other case, the information will be accepted on the next day the Council is open for business.

Under the Act, the Council has 42 days to determine your application (excluding the period from the date of this request until the information is received to the Council's satisfaction).

Available Documents
Documents listed in this section can be provided to the applicant as part of this request. To add a document to the request use the checkbox to select the document and then click the 'Add Selected' button. The added document will appear in the Documents to be Provided section below.

Version	Document Type	Description	Filename (size)	Uploaded (preparer)	Form
<input type="checkbox"/>	Request for Information	RFI	Request for Further Information.docx (11 KB)	20/02/2024 Russell Dobie	RHT-HOB-2024-0009 Heritage Review

Select All | Deselect All | + Add Selected

Documents Provided with this Request
Documents in this section will be provided to the recipient with this request. As part of their response, the recipient can upload a new version of a document listed here and/or upload new documents to be provided with their response.

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

+ Add Revision | + Add Document

Form published: 10/01/2024 11:47

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 Information document from Heritage Tasmania. 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-2024-0008 (External Reference: N/A)

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

Draft (Started: 21/02/2024 | Completed: 27/02/2024) → **Request** (Started: 27/02/2024 | Completed: 27/02/2024) → **Under Review** (Started: 27/02/2024 | Due: 12/03/2024) → **Completed**

Task

Acknowledge response
Assigned to: [User]

Description
[Description text]

[Download Form](#) Save Save & Acknowledge

Information Requested
Showing 0 to 0 of 0 entries

#	Code	Description	Reason
No results			

Response comments
Response provided by recipient.

Response to Request for Further Information
Response body

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
No Documents Found.						

[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.

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.

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:

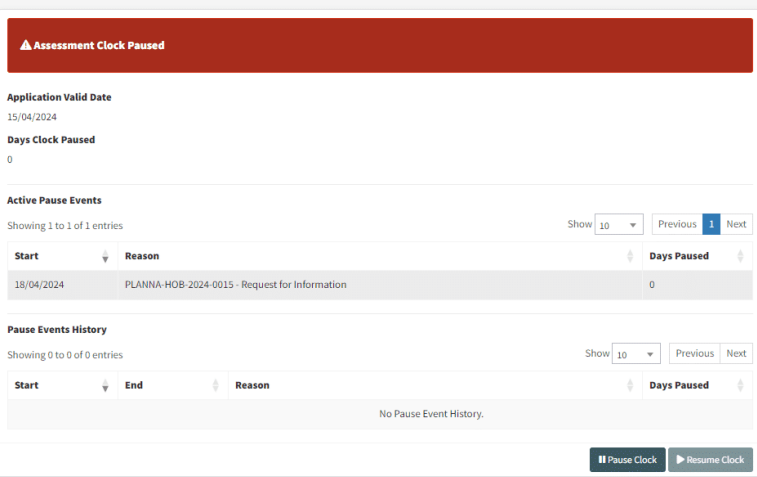
- Select 'Resume Clock'.
- Use the 'Manual Resume Date' option to select the date that the manual pause event ended. This can be the current date or any date since the manual clock was paused.
- Confirm by selecting 'Resume Clock'.

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.



The screenshot shows a user interface for 'Assessment Clock Paused'. At the top, there is a red banner with a warning icon and the text 'Assessment Clock Paused'. Below this, the 'Application Valid Date' is listed as 15/04/2024, and 'Days Clock Paused' is 0. The 'Active Pause Events' section shows one entry with a start date of 18/04/2024 and the reason 'PLANNA-HOB-2024-0015 - Request for Information', with 0 days paused. The 'Pause Events History' section is empty, showing 'No Pause Event History'. At the bottom right, there are two buttons: 'Pause Clock' and '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 Heritage Tasmania

The screenshot shows a web application interface for managing referrals. At the top, a navigation bar includes 'Generate Request, Referral or Invoice' and several tabs: 'Advertising Referral', 'General Information, Non-Strategic', 'Heritage Tasmania Referral', 'Request for Information', 'Internal Referral', 'Invoice', 'Provide RFI Response to Heritage Tasmania', and 'Tax/Water Referral'. The 'Provide RFI Response to Heritage Tasmania' tab is highlighted with a yellow box. Below this, the main form is titled 'Referral of RFI Response to Authority' and shows a progress bar with 'Draft', 'Review', and 'Completed' stages. The 'Draft' stage is active, with a 'Submit Referral of RFI Response to Authority form' task. A 'Response comments' section is highlighted with a yellow box, containing a text area for 'Response to Request for Further Information'. Below this are sections for 'Available Documents' and 'Documents to be Provided', both containing tables for document management. The 'Available Documents' table has one entry: 'Request for Information' with a description 'Request for Further Information.docx (1.1 KB)' and a 'Prepared by' field 'RHT HCB 2024-0000 Heritage Review'. The 'Documents to be Provided' table is currently empty.

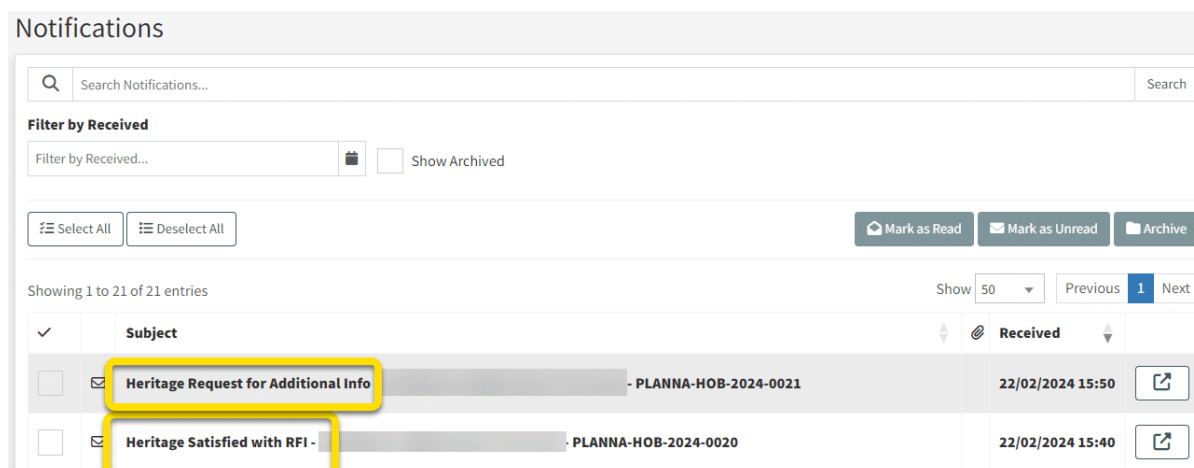
Navigate back to the assessment screen and head to the 'Generate Request, Referral or Invoice' section. Create the 'Provide the RFI Response to Heritage Tasmania' form.

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

Users can provide any comments, input or communications to Heritage Tasmania in the Response Comments section.

Send out the response when ready.

Response from Heritage Tasmania



The screenshot shows a 'Notifications' interface with a search bar at the top. Below the search bar, there is a 'Filter by Received' section with a dropdown menu and a 'Show Archived' checkbox. There are also buttons for 'Select All', 'Deselect All', 'Mark as Read', 'Mark as Unread', and 'Archive'. The main area displays a list of notifications, with the first two entries highlighted in yellow:

✓	Subject	Received
<input type="checkbox"/>	Heritage Request for Additional Info - PLANNA-HOB-2024-0021	22/02/2024 15:50
<input type="checkbox"/>	Heritage Satisfied with RFI - PLANNA-HOB-2024-0020	22/02/2024 15:40

When the response is received, a notification is 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 Organisation's 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.

The notification will tell if Heritage Tasmania is satisfied or if they are requesting for additional information.

Creating and Tracking External Referrals to Heritage Tasmania

Planning Summary

Planning Application

Assessment

Draft

Review

Further Information Requested

Submit Request

Further Information Requested Summary

Download PDF

PlanBuild TASMANIA

SUBMIT REQUEST

Reference

Address

Titles

Assessing Officer Comments

Response comments

Documents to be Provided

If Heritage Tasmania is after additional information, the request will be stated in the summary document.

To access that:

1. Go to the form summary page via the Sub Project page (or via the notification email).
2. Download and open the 'Further Information Request Summary'.
3. Look for the details under 'Assessing Officer Comments'.

Documentation that has been uploaded by Heritage Tasmania 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 included them in the Document Pack of the outcome.