



PlanBuild
TASMANIA

TasWater User Guide: Respond to a Referral

When TasWater receives a referral from the Planning Authority, it would first be visible to users who have the Assessing Officer role in the portal under Organisation Tasks.

After the referral is deemed valid and noted by the support officer (contains sufficient details and documents), the manager of the department can assign to one of the Assessing Officer to review and provide a response to the Planning Authority.

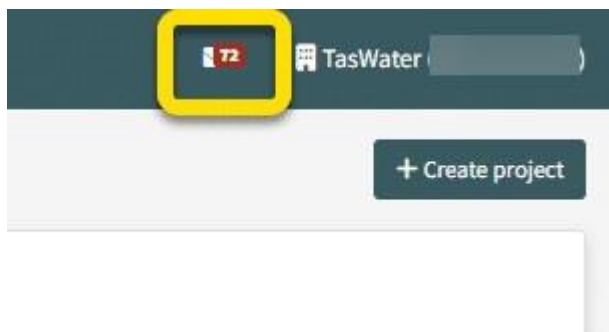
How do I know if a referral has been made?

PlanBuild Tasmania Notifications

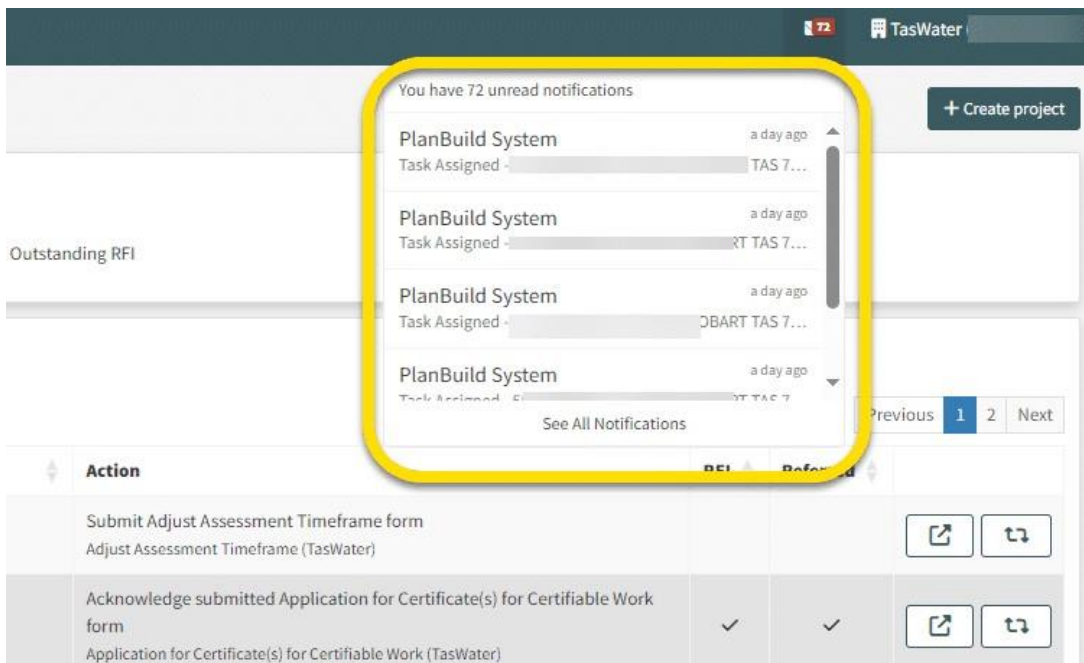
When a referral occurs, a notification (named 'Application available for assessment - Planning Referral') will be sent to the Development inbox.

This is because the user 'Development Services' has been set up with the Application Notification Role applied. The referral will also be available / visible and available to those with Assessing Officer role via the Organisation Tasks list.

By clicking on the white envelope icon, you can see and open the most recent notifications.



You can click on "See All Notifications" to view a list of notifications. Click on the individual notification to display the notification details.



PlanBuild Tasmania Notifications

Click 'Log in' from within the notification, and it will take you directly to the task you need to complete.

PlanBuild

Council (EHO Referrals)

Notifications

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Task Assigned - TAS 7216 - - Review Referral - Assigned

To: EHO Referrals (el...@...v.au)

Received: 20/10/2023 10:15



The following task for New house at : 7216 has been assigned to you in PlanBuild.

Task: Review Referral

Description: Complete referral request, including an Assessment Report, if required. From this screen you can Request further Information. This will be referred back to the party who has referred this application to you for action. If you do not require any further information, complete the referral request, select 'Save and Send' to refer it back to the requesting party.

Log in to see the details.

DISCLAIMER

This is an automated email generated by PlanBuild Tasmania. If you have received the transmission in error, please ignore this email.

Task Lists

Alternatively, Officers can view the new referral task from their Task List on their dashboard.

The task will appear under 'Organisation Tasks' for anyone to open, view and claim.

There are two action icons at the end of the row. You can open the task in a new browser using the pop-out icon so that you can keep this page (dashboard) open. Clicking the other icon will show you a list of referral history of this application (if there are any).

My Task List 1

Showing 0 to 0 of 0 entries

Created

Due

Remaining

Owners

Applicants

Address

Sub Project

Action

RFI

Referred

Paused

No Assigned Tasks found.

Organisation Tasks 2

Showing 1 to 8 of 8 entries

Created

Due

Remaining

Owners

Applicants

Address

Sub Project

Action

RFI

Referred

Paused

Assignee

16/04/2024	08/05/2024	22 days	Owner User	Owner User			Assess Planning Referral to TasWater form Planning Referral to TasWater (Planning)						 
21/03/2024	26/03/2024	20 days overdue	Owner User	Owner User			Acknowledge submitted Application for Amended Certificate(s) for Certifiable Work form Application for Amended Certificate(s) for Certifiable Work (TasWater)						 
20/03/2024	22/03/2024	25 days overdue	Owner User	Owner User			Acknowledge submitted Application for Certificate(s) for Certifiable Work form Application for Certificate(s) for Certifiable Work (TasWater)						 
18/03/2024	21/03/2024	25 days overdue	Owner User	Owner User			Acknowledge submitted Application for Certificate(s) of Water and Sewerage Compliance form Application for Certificate(s) of Water and Sewerage Compliance (TasWater)						 

As a Development Support Officer (Users assigned with the 'Admin Officer' role in the portal)

Review and validate the application.

Claim Task

1. You have to select 'Claim Task' first if the task was not directly assigned to you.
2. You do not have to 'Claim Task' if the referral is assigned to you directly. If for any reason you need to reassign it to someone else, you can click on the purple button (Reassign Task) and select the assignee from the dropdown.

You also have the option to 'Unclaim Task', which will unassign the task, and release the task back to the Organisation Task List on the dashboard for another user to claim. In the 'new' application form, you are required to choose the 'Related Form' from the dropdown. If there is more than one, check the reference on the Sub Project page and pick the certification that you need to supersede.

The image displays two screenshots of a task management interface, separated by a dashed line. Both screenshots show a progress bar at the top with four stages: 'Draft' (green), 'Submitted' (dark green), 'Assessment' (grey), and 'Completed' (grey). The 'Draft' stage is active in both, with a yellow circle containing the number '1' next to it. Below the progress bar, the task is titled 'Task' and 'Acknowledge submitted Application for Certificate(s) for Certifiable Work form'. The first screenshot shows the task as 'Assigned to: Unassigned' and has a yellow 'Claim Task' button. The second screenshot shows the task as 'Assigned to: Ted TasWater' and has a purple 'Reassign Task' button and a grey 'Unclaim Task' button. At the bottom of the second screenshot, there are buttons for 'Download Form', 'Go to Payments', 'Save', and 'Save & Confirm'.

Review and Referrals

If further information is required from the applicant, the Officer can start a 'Request for Additional Information' form under 'Generate Request or Referral' to do that.

They can start an 'Internal Referral' at the same time if needed.

In PlanBuild Tasmania, these referral processes do not stop the Admin Officer from progressing the referral responses to the next stage, however, it depends on the organisation's process on if they need to wait until all required documents are received.

Officers can view the details of the referral and the documents attached to it.

Generate Request or Referral

From this section, you can request additional information, internally refer the application, refer to other Authorities.

When requesting additional information for a SPAN, please upload/select the request under the 'Add Conditions or Request Information' section, and send it to Council using the 'Send RAI to Council' button on the top right corner.

Internal Referral

Request for Additional Information

Release the Task to the Assessment Team

When ready, in the 'Internal Communications' section, notes can be added under the 'Notes' tab that the application is valid (and any other information that needs to be recorded). You can also attach any relevant documents using the 'Documents' tab or create a task to a particular user under the 'Communications' tab if needed.

The Internal Communications section is only visible to internal users.

At the bottom of the Task summary box, click 'Save'.

Next, depending on the agreed business procedure, either:

1. Click on the purple button to reassign the task to the Development Assessment Manager or Development Compliance Manager.

Or

2. Click on 'Unclaim Task', so that the Development Assessment Manager or Development Compliance Manager can claim the task from the Organisation Task List.

The screenshot shows the 'Internal Communications' section. On the left, there are instructions and three tabs: 'Notes', 'Attachments', and 'Communications'. The 'Notes' tab is active. The main area shows a table with columns 'Created On', 'Created By', and 'Content'. Below the table, it says 'No notes available.' and there is an 'Add Note' button.

The screenshot shows the 'Task' summary box. At the top, there are three tabs: 'Draft', 'Review', and 'Completed'. The 'Draft' tab is active. Below the tabs, there is a 'Task' section with the title 'Assess Planning Referral to TasWater form'. There is a 'Download Form' button. At the bottom right, there is a 'Send referral response' section with three buttons: 'Save', 'Issue SPAN', and 'Send RAI to Council'.

As a Development Assessment / Compliance Manager (Users assigned with the Work Admin role in the Portal)

Reassign Task

The manager will be given the Work Admin role in the portal. When the referral tasks are ready to be responded to, they can assign the task among their team.

You can use the search function (on the left-hand side menu) to perform a Task Search.

Select the relevant referral task/s and assign them to a particular Assessing Officers. You can then assign each task individually or bulk assign (multiple) tasks to officers.

Note: When clicking on '+Assign', a drop down will have a list of possible assignees to select from.

Tasks can also be assigned via the Organisation Task list.

Task Search ?

Task Administration

Enter address, reference, project/sub project or application name, owner or applicant details Search

Sub Project Type: Select sub project type Department: Select Department Select Assignee: Select Assignee

Filter by Due Date: Filter by Due Date...

Showing 1 to 8 of 8 entries

✓	Created	Due	Reference	Owners	Applicants	Address	Project	Sub Project	Action	Sub Project Type	Department	Assignee
☐	19/10/2023	18 days	TASWASPA-CLA-2023-Y524	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	TasWater Development Services	
☐	24/08/2023	40 days overdue	TASWASPA-SOR-2023-OMC4	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	-	
☐	25/10/2023	21 days	TASWASPA-CLA-2023-32YD	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	TasWater Development Services	
☐	09/10/2023	5 days overdue	TASWASPA-CLA-2023-71PY	Owner User	Owner User				Planning Referral to TasWater (Planning) Assess Planning Referral to TasWater form	Planning	-	
☐	23/10/2023	-	TASWAA-HOB-2023-QMRF	Bob Builder	-				Internal Referral (TasWater) Submit Internal Referral form	TasWater	-	
☐	24/10/2023	14 days	RLD-CLA-2023-5ZEY	Owner User	CLARENCE LGA				Consent to Register Legal Document Referral to TasWater (Planning) Assess Consent to Register Legal Document Referral to TasWater form	Planning	-	

Select All Deselect All

Unassign Assign

Find the Task under Task List

Depending on the business procedure, the manager will be able to find the referral task under either 'My Task List' (if the Task is assigned to the manager directly by the Admin Officer) or Organisation Tasks (if the Officer released the task using the 'Unclaim Task' button).

Open the task page. In the Task Summary section, claim the task if it hasn't been assigned to you, and then click on the purple button to reassign it to an Assessing Officer.

The screenshot shows a task management interface. At the top, there are three tabs: 'Draft' (green), 'Review' (dark green), and 'Completed' (grey). The 'Review' tab is active, showing 'Started: 17/07/2024' and 'Due: 06/08/2024'. Below the tabs, the task is titled 'Assess Planning Referral to TasWater form'. It includes instructions: 'Review the referral request. Use this form to either: request further information or to generate a SPAN.' and 'Assigned to: Ted TasWater'. There is a 'Download Form' button. On the right, there are buttons for 'Reassign Task' (purple) and 'Unclaim Task' (grey). At the bottom right, there is a 'Send referral response' section with buttons for 'Save', 'Issue SPAN', and 'Send RM to Council'.

As an Assessing Officer

Review the application and respond to the referral.

Review and respond

You can review the planning application and the documents provided in the application. Select the appropriate type of SPAN response from the drop down (no objection /conditions applied / further information required).

The screenshot shows the 'SPAN response' section. It says 'Use this section to select if:' followed by three bullet points: 'There are no objections to the application; OR', 'There are conditions to be applied; OR', and 'Further information is required.' Below this is a dropdown menu titled 'Pursuant to the Water and Sewerage Industry Act 2008 (TAS)*'. The dropdown is open, showing three options: 'Pursuant to the Water and Sewerage Industry Act 2008 (TAS)...', 'Section 56P(1) - TasWater does not object to the proposed development and no conditions are imposed.', and 'Section 56P(1) - TasWater imposes the following conditions on the permit for this application:'. The third option is highlighted in blue.

Add Conditions and Documents

Add conditions or requests for information under 'Add Conditions or Request for Information'.

You can add pre-entered conditions and reasons for request using the '+Add Library Reason or Condition' button, or type in new content using the '+Add New Reason or Condition' option. Do not use the 'Add Referral Condition' option - this will be used by the Council when creating the permit. The documents included under 'Referral Documents' will be provided to the Council. You can use this section when requesting for further information or issuing the SPAN.

However, you should Leave the stamp date blank, the system will apply the date at the time of stamping.

Add Conditions or Request Information

Use this section to either:

- Add conditions to the SPAN; OR
- Request information from the applicant.

To request information:

- Select the Request Info or Add Condition button; AND
- Select a reason from the library or add a new reason

To add conditions:

- Select the Request Info or Add Condition button
- Select any conditions that TasWater is seeking to include if the planning application is approved.

Do not use the 'Add Referral Condition' option. This will be used by the Council when creating the permit.

Showing 0 to 0 of 0 entries

#	Code	Description	RFI or Condition
No results			

+ Add New Reason or Condition
+ Add Library Reason or Condition
+ Add Referral Condition

Referral Documents

The documents included here will be provided to the Council.

If requesting further information:

- Use this section to add any documents that you want to refer back to the applicant

If issuing a SPAN with approved documents:

- Use this section to add any approved documents;
- Select the order that these documents will be referenced on the SPAN.
- Select the documents that will be stamped as part of the approval.
- Review previous revisions of a document.
- Download a document.
- Update a document when a new revision has been uploaded.

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

Stamp Date...

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

+ Add Revision
+ Add Document

Send the Response

Choose the appropriate Referral Outcome and Assessment Fee Schedule from the dropdowns, and state the Assessment Fee Amount.

State the ET Assessment Outcome. This information is for TasWater's use and reporting.

Put in your name, title and contact details.

Lastly, choose either 'Issue SPAN' or 'Send RFI to Council' in the Task Summary box to send o the referral response.

The Planning Authority will now receive a notification and be able to review the SPAN and issue the Planning Permit.

Referral Outcome

Enter details about the outcome of this application or referral. Details entered here are for TasWater use.

Application: Referral Outcome

Assessment Fee Schedule

Assessment Fee Amount

ET Assessment Outcome

Water ET Assessment: Additional: New

sewer ET Assessment: Additional: New

Notes / Comments

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 issue invoices.

Internal Referral Request for Information From Council

Requests and/or Referrals

Any requests, referrals or invoices that have been created will be displayed here.

Showing 0 to 0 of 0 entries

Created On	Reference	Referral	Request	Current Due Date	Completed Date	Status
No Referrals Found						

TasWater Details

Officer Name

Officer Title

Officer Contact Number

Task

Assign Planning Referral to TasWater User

Assigned to: Council.com.au

Description

Review the referral request.

Use this form to either request further information or to generate a SPAN.

+ Add New Reason or Condition
+ Add Library Reason or Condition
+ Add Referral Condition