

Manage Team Workload

Instructional guide for:

- Relevant Authorities

6.1 Work Allocation

6.2 Reallocation of Work

Version 2.0
2 July 2020



Government of South Australia
Attorney-General's Department



Table of Contents

Overview	3
6.1 Work Allocation	4
6.1.1 Locate Submitted Development Application.....	5
6.1.2 Determine Development Type and Complexity	7
6.1.3 Viewing Current Workload	9
6.1.4 Allocating a Team Member	11
6.1.5 Received Consent for Application Allocation.....	13
6.2 Re Allocation of Work	14
6.2.1 Deleting and Reallocating a Team Member	15
6.2.2 Reallocating Application Consent to Team Leader or Manager	17
6.2.3 Received Consent for Application Allocation.....	19
Version History	19

Overview

This Module Guide includes **Software Version 1.4.12** features and functionality.

- Module 1: Introduction to Plan SA
- Module 2: Navigate the Planning Workflow
- Module 3: Manage Online Account
- Module 4: Submit a Development Application
- Module 5: Track a Development Application
- Module 6: Manage Team Workload**
- Module 7: Verify Development Application (Planning, Land Division & Building)
- Module 8: Fee Payments
- Module 9: Assess Consent (Planning, Land Division & Building)
- Module 10: Public Notification
- Module 11: Request and Respond to Referrals (Internal and External)
- Module 12: Make Decision on the Assessed Consent
- Module 13: Variation to Development
- Module 14: Issue Development Approval
- Module 15: Appeals
- Module 16: Issue Land Division Certificate of Approval (CoA)
- Module 17: Building Notification
- Module 18: Development Application Report, Section 7



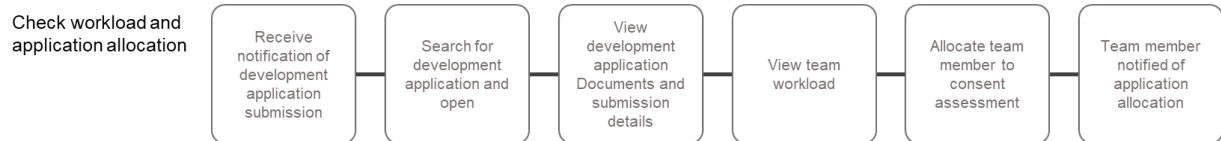
In addition to the Guide, there are a series of [videos](#) available on the following topics.

6.0 Overview of Manage Team Workload

6.1 Work Allocation

Overview

This topic will take you through how to manage the workload of your team through the identification of team member's current workload and the allocation of development application/s based on team member's availability, and/or the type of consent (planning, land division and building).



Audience

- Relevant Authorities
- Referral Bodies

Learning Outcomes

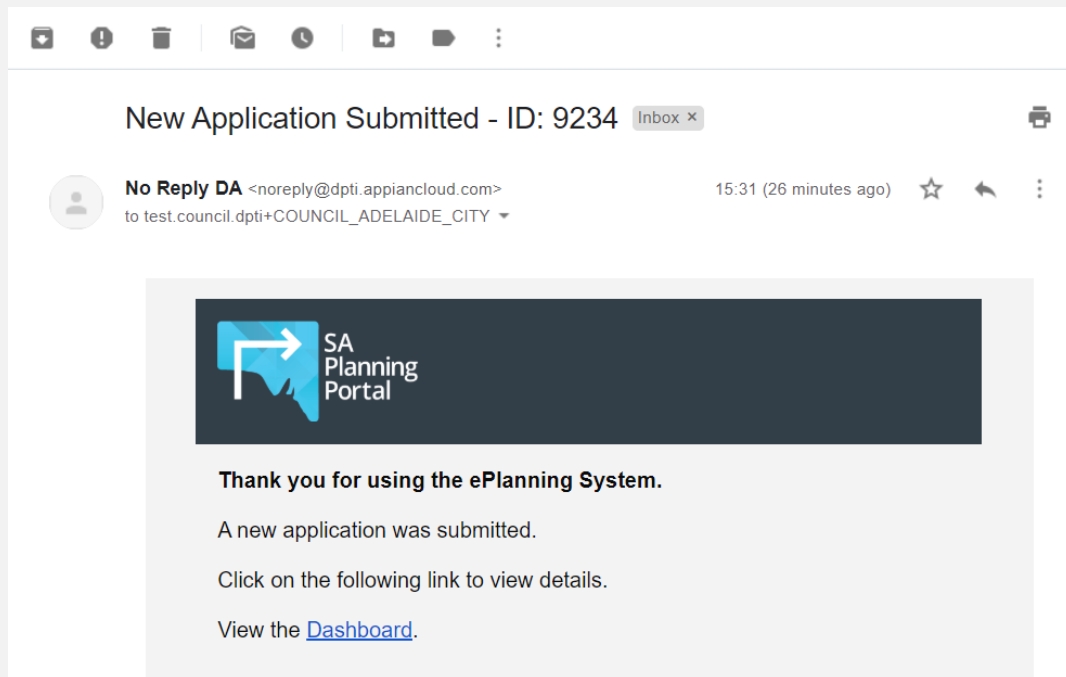
- Understanding how to search for an application through the dashboard
- View the current workload for an application
- Allocate a team member against relevant consents within the application
- Save work allocations.

Topics

- 6.1.1 Locate Submitted Development Application
- 6.1.2 Determine Development Type and Complexity
- 6.1.3 Viewing Current Workload
- 6.1.4 Allocating a Team Member
- 6.1.5 Received Consent for Application Allocation

6.1.1 Locate Submitted Development Application

On submission of a development application a notification email (shown below) is delivered to your organisations group mailbox; subject contains the application number and a link directly to the lodge application.

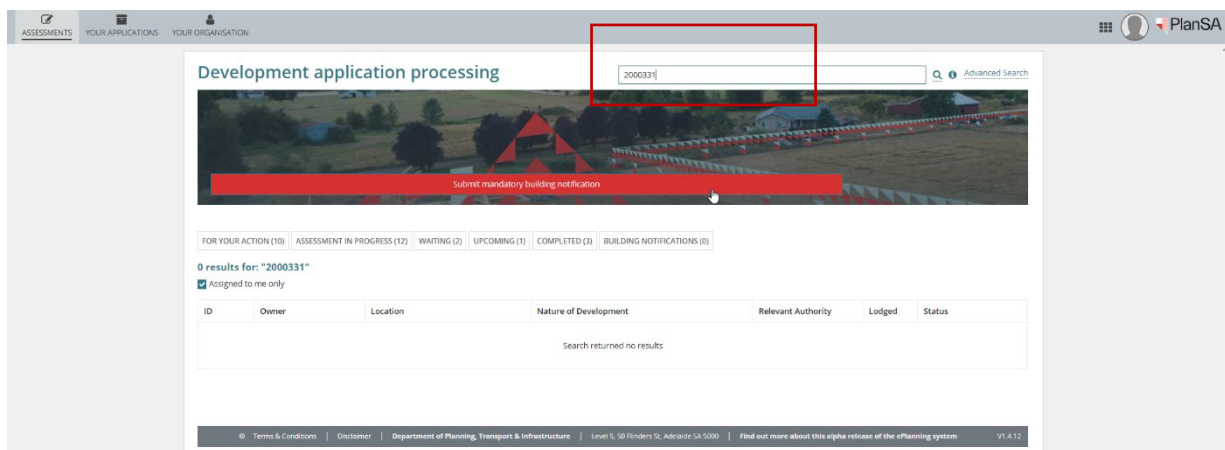


Use the email **Dashboard** link which will take you to the log-in page, or straight to your Assessment dashboard when already logged in.

From your Assessments dashboard locate the submitted development application using one of the following methods.

Method 1

Use the **Search** option and the development application ID.



Method 2

Within **For Your Action** remove the **Assigned to me only** flag to see all development applications for your organisation.

Development application processing

Submit mandatory building notification

FOR YOUR ACTION (10) ASSESSMENT IN PROGRESS (12) WAITING (2) UPCOMING (1) COMPLETED (3) BUILDING NOTIFICATIONS (0)

For your action

☐ Assigned to me only

ID	Owner	Location	Nature of Development	Lodged	Action	Who	
20000331	P Public	LOT 11 EAST TCE PARACHILUNA SA 5730 LOT 11 EAST TCE PARACHILUNA SA 5730	house and shed		Awaiting Verification	—	1
20000298	B Monier	Lat : 29.6454728 Long: 138.0672534	Installation of a new mobile phone tower	25 Jun 2020	Commence Assessment	ⓘ	65
20000268	city of salisbury	UNIT 41 6 LOADES ST SALISBURY SA 5108	I said shop		Awaiting Verification	—	6
20000263	N Symonds	Managers office, 50 Flinders Street, Adelaide SA 5000	yyrnydthgh		Awaiting Verification	—	6
20000231	J COOL	LOT 200 RAILWAY TCE S MARREE SA 5733	Increase accommodation by 5 units - solar panels - shop - forgot something	15 Jun 2020	Commence Assessment	ⓘ	47

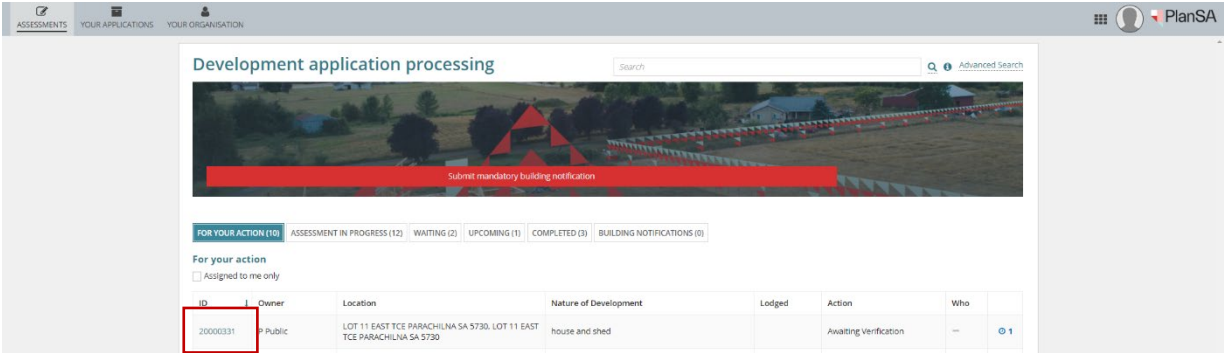
1 - 5 of 10

Terms & Conditions | Disclaimer | Department of Planning, Transport & Infrastructure | Level 5, 50 Flinders St, Adelaide SA 5000 | Find out more about this alpha release of the ePlanning system | V1.4.12

6.1.2 Determine Development Type and Complexity

Is performed to determine the development type and complexity to appropriately allocate to a team member for assessment.

Open the development application from the **For Your Action** table.



Go to the **Documents** store to view the attached plans and technical drawings.

Development application: 20000331

SummaryDocumentsEvent HistorySharing accessRelated Actions

Development location(s) [edit](#)

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL11 **Council** Pastoral Unincorporated Area

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL12 **Council** Pastoral Unincorporated Area

Nature of development

house and shed

Elements selected [edit](#)

- New housing
 - Dwelling
- Shed
 - Shed

[Submission details](#)

[Zoning information](#)

[Applicant's view](#)

Assessment status

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status
Planning Consent	State Commission Assessment Panel	Type to select the user	Awaiting Verification
Building Consent			Initialised
Development Approval for: Planning Consent Building Consent	State Commission Assessment Panel	No assessor assigned Edit	Awaiting Precursor Consent

[View team workload](#)

[SAVE USER ALLOCATION](#)

Select the document file name to download, and open to view on-screen. Repeat until all plans and technical drawings have been reviewed and the complexity of the development determined.

Development application: 20000331

Summary Documents Event History Sharing access Related Actions

Search by Name Search by Type

System Generated Emails Snapshots Invoices Decision Documents Other Documents All Documents

Document	Document Type	Date Created	Superseded	Edit
ElevationPlan-14778.docx	Elevations	26 Jun 2020 13:24		

ElevationPlan-14...docx

Return to the **Summary** and expand the **Submission Details** to view the development details submitted by the Applicant.

Development application: 20000331

Summary Documents Event History Sharing access Related Actions

Click the property location image above to open the South Australian Property and Planning Atlas (SAPPA) in a new tab, and view zoning and other layers for this location.

Development location(s) [edit](#)

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL11 **Council** Pastoral Unincorporated Area

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL12 **Council** Pastoral Unincorporated Area

Nature of development

house and shed

Elements selected [edit](#)

- New housing
 - Dwelling
- Shed
 - Shed

Submission details

Development Details [edit](#)

Current Use	vacant land
Proposed Use	house with a shed
Development cost (excluding fit out)	\$ 90,000
Proposed development details	house and shed

Consents required / Relevant authorities assigned to assess them

- Planning Consent
- Building Consent

State Commission Assessment Panel (to be confirmed)

Consent assessment order [edit](#)

Submission 1	Planning
Unsubmitted	Building

Element details [edit](#)

Scroll through the submission details taking note of the following, then collapse the Submission Details to hide the detail.

- Development Details
- Element Details


6.1.3 Viewing Current Workload

After determining the development type and complexity, you can view the team’s current workload to assist with identifying who within the team has the capacity to take on new work, or to check a team member’s current workload.

On expanding **View team workload** a series of graphs displays showing user names against their relevant work load, broken down in to Land Division, Planning, Building and Development Approval.

Development application: 20000331

SummaryDocumentsEvent HistorySharing accessRelated Actions



Click the property location image above to open the South Australian Property and Planning Atlas (SAPPA) in a new tab, and view zoning and other layers for this location.

Development location(s) [edit](#)

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL11 **Council** Pastoral Unincorporated Area

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL12 **Council** Pastoral Unincorporated Area

Nature of development

house and shed

Elements selected [edit](#)

- New housing
 - Dwelling
- Shed
 - Shed

[Submission details](#)

[Zoning information](#)

[Applicant's view](#)

Assessment status

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
Planning Consent	State Commission Assessment Panel	<input type="text" value="Type to select the user"/>	Awaiting Verification	<div><div></div><div>1</div></div>
Building Consent			Initialised	
Development Approval for: Planning Consent Building Consent	State Commission Assessment Panel	No assessor assigned Edit	Awaiting Precursor Consent	

[View team workload](#)

[SAVE USER ALLOCATION](#)

Select the team member’s bar to display the number of allocations.



Select the **Allocated** pop-up to view a listing of the team member’s development applications to identify what stage in the assessment process they are, e.g. Verification, Assessing the consent etc.

Review the development applications assigned to the team member, then use **Back to all users** to view the next team member's allocations.

Assessment status

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
► Planning Consent	State Commission Assessment Panel	Type to select the user	Awaiting Verification	1
Building Consent			Initialised	
Development Approval for: Planning Consent Building Consent	State Commission Assessment Panel	No assessor assigned Edit	Awaiting Precursor Consent	

▼ View team workload

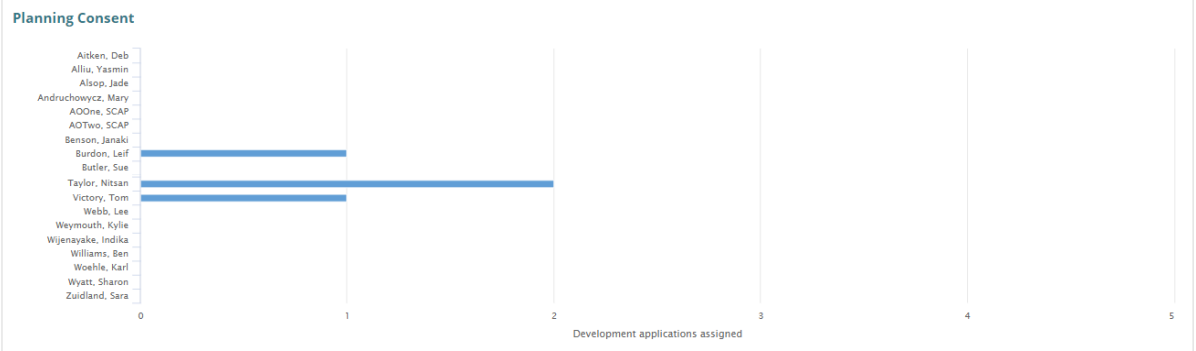
SAVE USER ALLOCATION

< Back to all users

Development Applications assigned to Burdon, Leif

ID	Owner	Location	Nature of Development	Lodged
20000231	J COOL	LOT 200 RAILWAY TCE S MARREE SA 5733	Increase accommodation by 5 units - solar panels - shop - forgot something	15 Jun 2020

Repeat until you identify who in the team has availability to perform the assessment.



6.1.4 Allocating a Team Member

Is performed to allocate a team member to assess the consent and/or development approval.

When a team member is already assigned to assess a development application, under **Who** if you move your mouse over the icon the team member allocated displays.

Development application processing

Submit mandatory building notification

FOR YOUR ACTION (10) ASSESSMENT IN PROGRESS (12) WAITING (2) UPCOMING (1) COMPLETED (3) BUILDING NOTIFICATIONS (0)

For your action

☐ Assigned to me only

ID	Owner	Location	Nature of Development	Lodged	Action	Who
20000331	P Public	LOT 11 EAST TCE PARACHILNA SA 5730, LOT 11 EAST TCE PARACHILNA SA 5730	house and shed		Awaiting Verification	1
20000298	B Monier	Lat : 29.6454728 Long: 138.0672534	Installation of a new mobile phone tower	25 Jun 2020	Commence Assessment	65
20000268	city of salisbury	UNIT 41 6 LOADES ST SALISBURY SA 5108	I said shop		Awaiting Verification	0

In the open development application, go to the Assessment status table and start to type the name of the team member in the **Allocated Assessor** field against the consent allocating.

house and shed

Elements selected edit

- New housing
 - Dwelling
- Shed
 - Shed

> Submission details

> Zoning information

> Applicant's view

Assessment status

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status
Planning Consent	State Commission Assessment Panel	david	Awaiting Verification
Building Consent		David Lake	Initialised
Development Approval for: Planning Consent Building Consent	State Commission Assessment Panel	No assessor assigned Edit	Awaiting Precursor Consent

> View team workload

SAVE USER ALLOCATION

Noting, when a team member's name does not return, this means they are not assigned to this consent type. To update the team member's consent assignment refer to **Module 3 Manage Online Account** for instructions on updating your team member's consent access.

From the list of matching names, select the team member, then **Save User Allocation** to perform the allocation.

Assessment status

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
▶ Planning Consent	State Commission Assessment Panel	David Lake ✕	Awaiting Verification	1
Building Consent			Initialised	
Development Approval for: Planning Consent Building Consent	State Commission Assessment Panel	No assessor assigned Edit	Awaiting Precursor Consent	

> [View team workload](#)

[SAVE USER ALLOCATION](#)

✓ Allocation Saved Successfully

Return to **Your Assessment** dashboard and repeat until you have completed all allocations.

ASSESSMENTS YOUR APPLICATIONS YOUR ORGANISATION PlanSA

Development application processing

Submit mandatory building notification

FOR YOUR ACTION (10) ASSESSMENT IN PROGRESS (12) WAITING (2) UPCOMING (1) COMPLETED (3) BUILDING NOTIFICATIONS (0)

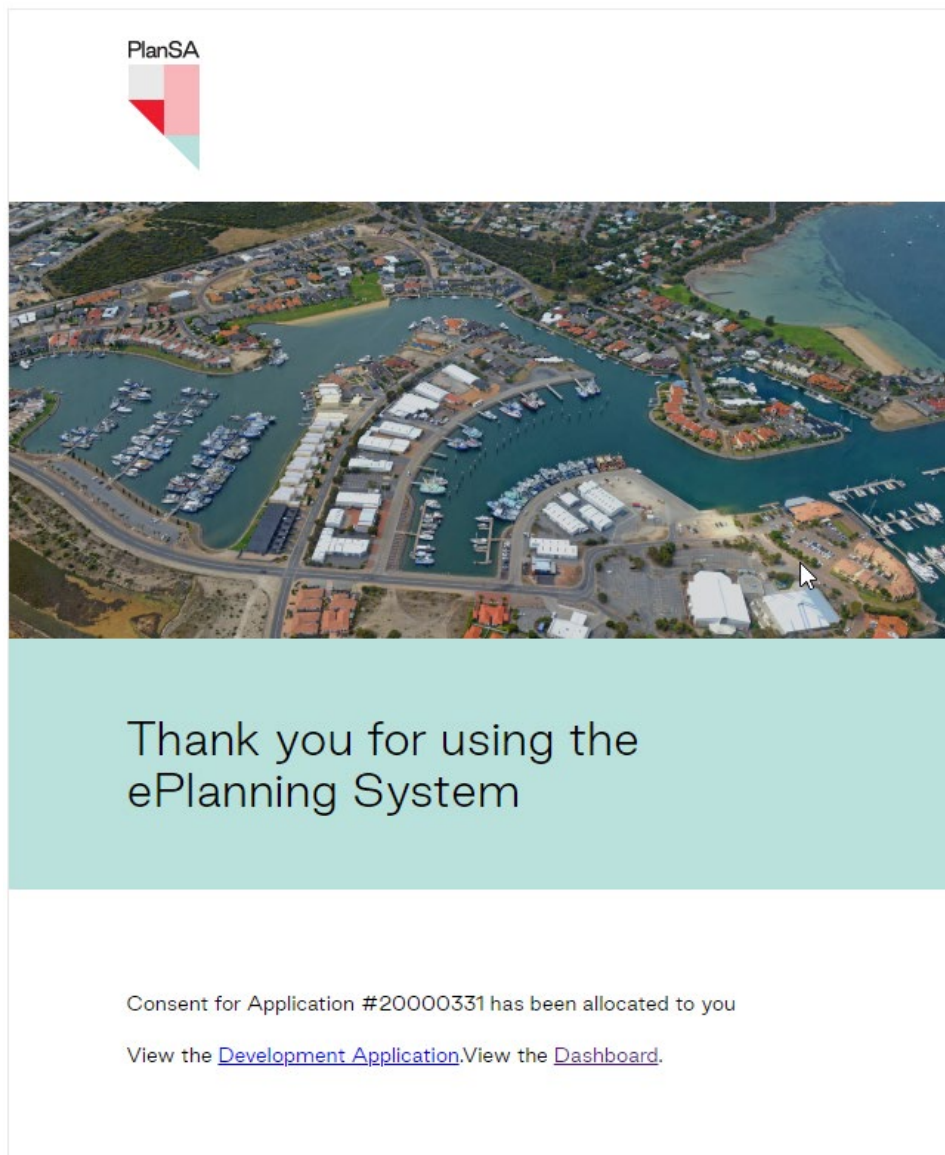
For your action
☐ Assigned to me only

ID	Owner	Location	Nature of Development	Lodged	Action	Who	
20000331	P Public	LOT 11 EAST TCE PARACHILNA SA 5730, LOT 11 EAST TCE PARACHILNA SA 5730	house and shed		Awaiting Verification	Assigned to David.Lake@sa.gov.au	1
20000298	B Monier	Lat :-29.6454728 Long:138.0672534	Installation of a new mobile phone tower	25 Jun 2020	Commence Assessment		65

6.1.5 Received Consent for Application Allocation

On allocation of a development application a notification email (shown below) is delivered to the team member's work email address; subject contains the application number and a link directly to the allocated application.

Use the 'Click on **this link**' which will take you to the log-in page, or straight to the development application when already logged in.



6.2 Reallocation of Work

Overview

This topic will take you through how to reallocate work between team members; as a team member, manager or team leader.

Learning Outcomes

- Delete and Reallocate a team member against relevant consents within the application
- Save work allocations

Topics

6.2.1 Deleting and Reallocating a Team Member

6.2.2 Deleting and Reallocating a Team Leader or Manager

6.2.3 Received Consent for Application Allocation

6.2.1 Deleting and Reallocating a Team Member

A team member's allocation may need to be amended based on capacity or resourcing restrictions and availability.

Use the **Advanced Search** option to search by the Allocated user (i.e. team member) to view all applications allocated to them.

Development application processing

Search

Hide Advanced Search

Submit mandatory building notification

FOR YOUR ACTION (10) | ASSESSMENT IN PROGRESS (12) | WAITING (2) | UPCOMING (1) | COMPLETED (3) | BUILDING NOTIFICATIONS (0)

Advanced Search

Development application number

Applicant

Owner

Relevant authority

Allocated user
David Lake

Date of development application lodged
From: dd/mm/yyyy To: dd/mm/yyyy

Date of development application decision
From: dd/mm/yyyy To: dd/mm/yyyy

Nature of development

Location of development

Title type
-- Select One --

Volume

Folio

Allotment number

Land division application type
-- please select --

The search will return all applications allocated to the team member, then open the application being reallocated.

Development application processing

Search

Refine Advanced Search

Submit mandatory building notification

FOR YOUR ACTION (10) | ASSESSMENT IN PROGRESS (12) | WAITING (2) | UPCOMING (1) | COMPLETED (3) | BUILDING NOTIFICATIONS (0)

2 results:

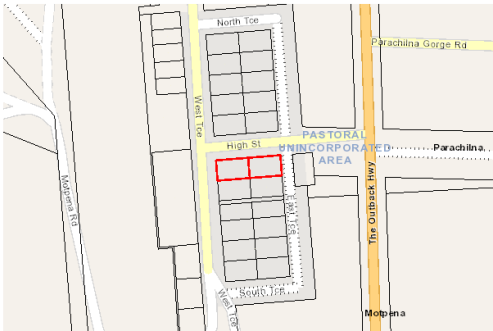
☐ Assigned to me only

ID	Owner	Location	Nature of Development	Relevant Authority	Lodged	Status	
20000331	P Public	LOT 11 EAST TCE PARACHILNA SA 5730, LOT 11 EAST TCE PARACHILNA SA 5730	house and shed	State Commission Assessment Panel		Submitted	1
20000073	D Lake	LOT 501 LUNATIC LANE ANDAMOOKA SA 5722	Demolition of existing dwelling and construction of a detached dwelling	State Commission Assessment Panel	22 May 2020	Assessment in progress	12

Go to the **Assessment Status** table and against the applicable consent, delete 'x' the allocated team member.

Development application: 20000331

SummaryDocumentsEvent HistorySharing accessRelated Actions



Click the property location image above to open the South Australian Property and Planning Atlas (SAPPA) in a new tab, and view zoning and other layers for this location.

Development location(s) [edit](#)

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL11 **Council** Pastoral Unincorporated Area

LOT 11 EAST TCE PARACHILNA SA 5730

Title ref CT 5787/439 **Plan parcel** T390401 AL12 **Council** Pastoral Unincorporated Area

Nature of development

house and shed

Elements selected [edit](#)

- New housing
 - Dwelling
- Shed
 - Shed

[Submission details](#)

[Zoning information](#)

[Applicant's view](#)

Assessment status				
Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
▶ Planning Consent	State Commission Assessment Panel	David Lake ✕	Awaiting Verification	1
Building Consent			Initialised	
Development Approval for: Planning Consent Building Consent	State Commission Assessment Panel	No assessor assigned Edit	Awaiting Precursor Consent	

[View team workload](#)[SAVE USER ALLOCATION](#)

Start to type the name of the team member in the **Allocated Assessor** field and from the list of matching names, select the team member, then **Save User Allocation** to perform the allocation.

Assessment status				
Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
▶ Planning Consent	State Commission Assessment Panel	Leif Burdon ✕	Awaiting Verification	1
Building Consent			Initialised	
Development Approval for: Planning Consent Building Consent	State Commission Assessment Panel	No assessor assigned Edit	Awaiting Precursor Consent	

[View team workload](#)

[SAVE USER ALLOCATION](#)

✓ Allocation Saved Successfully

Repeat, until all of the team members' consent allocations have been reallocated amongst the team.

6.2.2 Reallocating Application Consent to Team Leader or Manager

Is performed to assign the application consent to team leader and/or manager on completion of the consent verification or assessment to;

- reallocate the consent assessment to another team member,
- check the consent assessment before making a decision, or
- reallocate to another team member to perform the next consent, or
- reallocate to another team member to perform the development approval.

On completion of the consent verification or assessment return to **Development Application**.

Planning Consent for Development Application: 20000182

Consent status: Under Assessment

Development location(s)
LOT 1 MUNDY TCE ROBE SA 5276
Title ref CR 6157/820 Plan parcel D95673 AL1 Council Dc Of Robe

Zoning information
Zones
• Township Activity Centre
Overlays

Go to the **Assessment Status** table and against the applicable consent, delete 'x' the allocated team member.

Assessment status				
Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
▶ Planning Consent	State Commission Assessment Panel	Belinda Monier x	Under Assessment	29
Land Division Consent	District Council of Robe		Awaiting Precursor Consent	
Building Consent	District Council of Robe		Awaiting Precursor Consent	
Development Approval for: Planning Consent Land Division Consent Building Consent	District Council of Robe		Awaiting Precursor Consent	

> View team workload

SAVE USER ALLOCATION

Start to type the name of the team member in the **Allocated Assessor** field and from the list of matching names, select the team member, then **Save User Allocation** to perform the allocation.

Assessment status				
Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
▶ Planning Consent	State Commission Assessment Panel	Leif Burdon x	Under Assessment	29
Land Division Consent	District Council of Robe		Awaiting Precursor Consent	
Building Consent	District Council of Robe		Awaiting Precursor Consent	
Development Approval for: Planning Consent Land Division Consent Building Consent	District Council of Robe		Awaiting Precursor Consent	

> View team workload

SAVE USER ALLOCATION

✓ Allocation Saved Successfully

Return to your **Assessments** dashboard, and the **For Your Action** table may be empty as all your assigned applications have been reassigned to a team leader or manager.

The screenshot shows the PlanSA Assessments dashboard. The top navigation bar includes 'ASSESSMENTS', 'YOUR APPLICATIONS', and 'YOUR ORGANISATION'. The main header is 'Development application processing' with a search bar and an 'Advanced Search' link. Below the header is a banner image with a red overlay that says 'Submit mandatory building notification'. The 'FOR YOUR ACTION (0)' tab is selected, showing a table with columns: ID, Owner, Location, Nature of Development, Lodged, Action, and Who. The table is empty, with the text 'No items available' at the bottom. The 'Assigned to me only' checkbox is checked.

Remove the **Assigned to me only** flag to see all the development applications for your organisation.

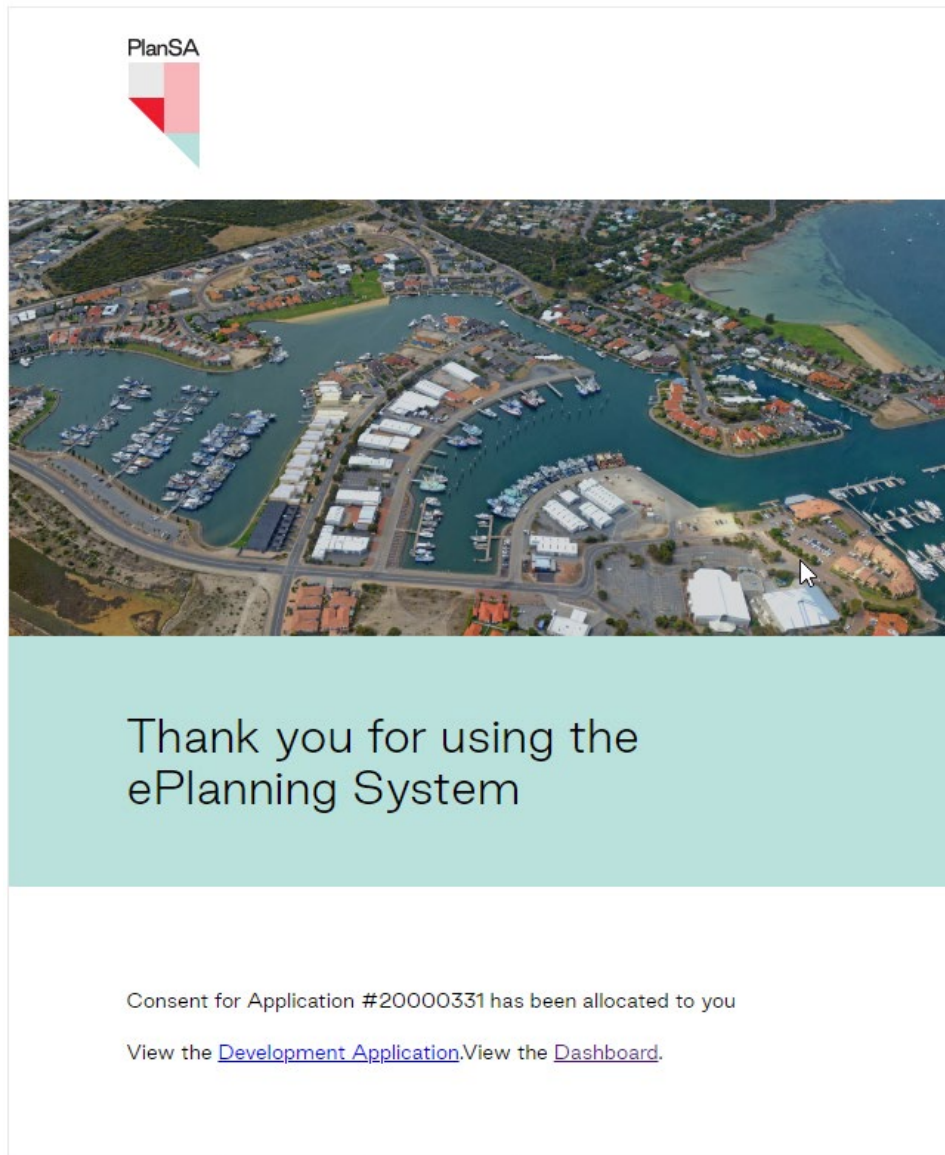
The screenshot shows the PlanSA Assessments dashboard with the 'Assigned to me only' checkbox unchecked. The 'FOR YOUR ACTION (9)' tab is selected, showing a table with columns: ID, Owner, Location, Nature of Development, Lodged, Action, and Who. The table contains 9 rows of data. The 'Who' column shows the user's profile icon and a count of items assigned to them.

ID	Owner	Location	Nature of Development	Lodged	Action	Who
20000331	P Public	LOT 11 EAST TCE PARACHILNA SA 5730, LOT 11 EAST TCE PARACHILNA SA 5730	house and shed		Awaiting Verification	1
20000298	B Monier	Lat :-29.6454728 Long:138.0672534	Installation of a new mobile phone tower	25 Jun 2020	Commence Assessment	65
20000268	city of salisbury	UNIT 41 6 LOADES ST SALISBURY SA 5108	I said shop		Awaiting Verification	0
20000263	N Symonds	Managers office, 50 Flinders Street, Adelaide SA 5000	yrydyfthgh		Awaiting Verification	0
20000231	J COOL	LOT 200 RAILWAY TCE S MARREE SA 5733	Increase accommodation by 5 units - solar panels - shop - forgot something	15 Jun 2020	Commence Assessment	47

At the bottom of the table, there is a pagination link: < 1 - 5 of 9 >.

6.2.3 Received Consent for Application Allocation

On reallocation of a development application a notification email (shown below) is delivered to the team member's work email address; subject contains the application number and a link directly to the allocated application.



For more information visit
plan.sa.gov.au



Government of South Australia
Attorney-General's Department