

## Background

1

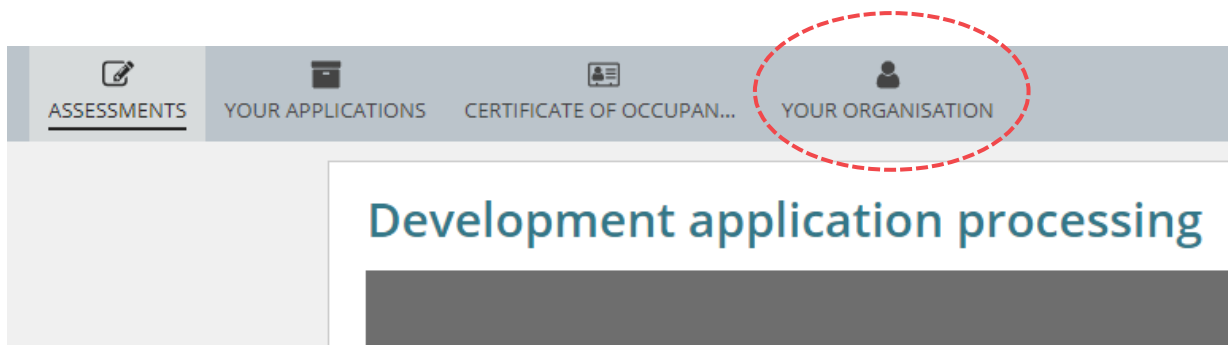
The setting up of your organisation's standard conditions, notes, and reserved matters (planning only) eliminates the need for manual entries during an assessment or when responding to a referral and ensures the condition and/or note wording is consistently used.

### Who can update the standard conditions and notes?

Nominated staff member(s) within each 'Organisation' are assigned to the 'Organisation Administrator' role, which has access to maintain details of the organisation, staff members' online account access, and details of the standard conditions and notes.

### How do I know if I am an Organisation Administrator?

An Organisation Administrator's dashboard ribbon will display the **Your Organisation** option.



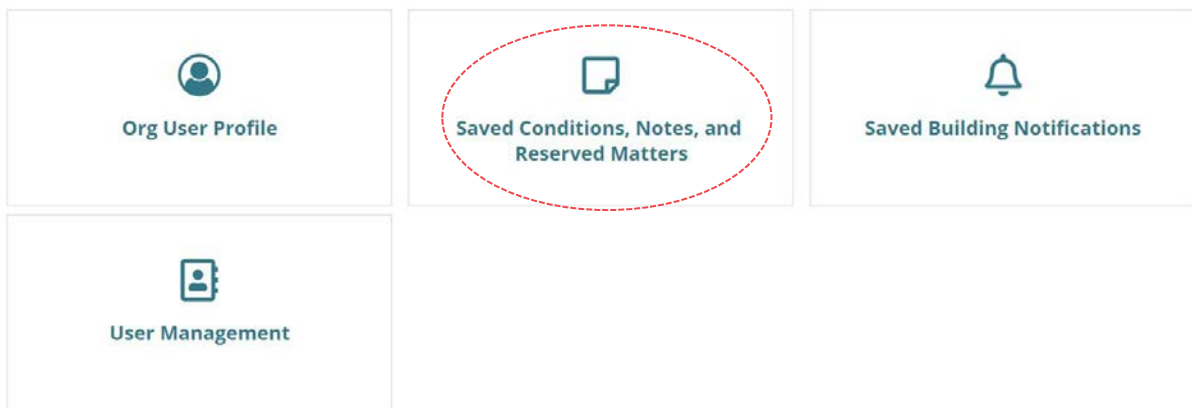
## Included instructions

- [Access saved conditions, notes, and reserved matters](#)
- [Perform a title search to locate a condition, note or reserved matter](#)
- [Create a Condition](#)
- [Create an Advisory Note](#)
- [Create a Reserved Matter](#)
- [Edit Conditions, Notes and Reserved Matters](#)
- [Delete Conditions, Notes and Reserved Matters](#)
- [Create a Group](#)
- [Modify a Group](#)
- [Export to excel a report of the standard conditions, notes and reserved matters](#)

## Access saved conditions, notes, and reserved matters

1. Click on **Your Organisation** within the Assessment dashboard.
2. Click on **Saved Conditions, Notes, and Reserved Matters** to show your organisations standard re-usable conditions, notes and reserved matters.

Development application processing



The **Saved Conditions, Notes and Reserved Matters** page shows with options for:

- Searching the page using 'key' words locate a specific condition, note or reserved matter
- Export to excel a report of the conditions, notes and reserved matters
- Sorting the display order within the consent Condition & Notes page
- Delete a condition, note or reserved matter
- Edit a condition, note or reserved matter
- Create a condition group

### Saved Conditions, Notes, and Reserved Matters

[Help for this section](#)

Use this screen to create a collection of reserved matters, conditions and advisory notes that you can easily add to documents (with the ability to edit each instance as required).  
Note: The 'title' you create for each comment is not displayed in documentations, it is for your internal reference and management of comments only

Search by keyword  SEARCH CLEAR SEARCH FILTER EXPORT REPORT

▼ **Conditions**

Planning Condition	Building Condition	Land Division Condition
Title	Display by default	Clearance requirement by default
Planning Condition	✓	✓
in accordance with plans	✓	✗

## Perform a title search to locate a condition, note or reserved matter

1. Type a key word, e.g., **accordance** or a number, e.g. 26 and then **SEARCH**.

The key word search accepts both alpha and numeric characters.

### Saved Conditions, Notes, and Reserved Matters

Use this screen to create a collection of reserved matters, conditions and advisory notes that you can easily add to documents (with the ability to edit each instance as required).  
Note: The 'title' you create for each comment is not displayed in documentations, it is for your internal reference and management of comments only

accordance    SEARCH    CLEAR SEARCH FILTER

The Conditions, Notes, Reserved Matters or Groups will show records containing the key word within the title.

2. Click on the **Building** and **Land Division** tabs to view matches.
3. Perform the required maintenance to the conditions, notes or reserved matters, referring to instructions:
  - [Edit Conditions, Notes and Reserved Matters](#)
  - [Delete Conditions, Notes and Reserved Matters](#)

#### ▼ Conditions

Planning Condition	Building Condition	Land Division Condition		
Title	Display by default	Clearance requirement by default	Sort	
in accordance with plans	✓	✗		Show/Edit

CREATE A REUSABLE CONDITION

## Create a Condition

A newly created condition is not automatically available from the consent under assessment or 'draft' referral response with conditions; manually add in the **Conditions and Notes** tab for the relevant consent / referral response when applicable.

1. Click on the applicable **Planning Condition**, **Building Condition** or **Land Division Condition** filter.
2. Click on CREATE A REUSABLE CONDITION.

### Saved Conditions, Notes, and Reserved Matters

[Help for this section](#)

Use this screen to create a collection of reserved matters, conditions and advisory notes that you can easily add to documents (with the ability to edit each instance as required).  
Note: The 'title' you create for each comment is not displayed in documentations, it is for your internal reference and management of comments only

**SEARCH** **CLEAR SEARCH FILTER** **EXPORT REPORT**

**Conditions**

**Planning Condition** **Building Condition** **Land Division Condition**

Title	Display by default	Clearance requirement by default	Sort		
Planning Condition	✓	✓	↓	🗑️	Show/Edit
in accordance with plans	✓	✗	↑ ↓	🗑️	Show/Edit

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**CREATE A REUSABLE CONDITION**

The Add new Condition page shows.

### Add new Condition

\* Title

\* Type

\* Condition

Display by default  Clearance requirement by default

This condition was added on these groups:

Select Groups  **ADD GROUP**

**CANCEL** **GO BACK** **SAVE**

### 3. Provide a **Title** for the condition.

The 'Title' is only a reference and will not be shown on the Decision Notification Form (DNF).

\* **Title**

\* **Type**

\* **Condition**

**B** **I**

Display by default  Clearance requirement by default

5

#### Tips for writing a 'title' for the condition

To easily identify the applicable condition in the **Conditions and Notes** tab the following 'title' format examples can be used:

- Stormwater C1 – insert description
- PC – insert description (*where PC indicates Planning Consent, or BC for Building, etc.*)

### 4. Choose the **Type** of condition (Planning, Land Division or Building).

### 5. Write the **condition** details.

## Add new Condition

\* **Title**

\* **Type**

\* **Condition**

**B** **I**

Provide the condition details

Display by default  Clearance requirement by default

#### Tip for writing a variable condition

When a condition includes variable selections such as the consent (planning, land division, building) or quoting the application number etc., include text to prompt the assessor to include the applicable/relevant information.

For example: *[choose: Planning consent/Development approval] or Development application ID Nos x, x, x.*

- Select either **display by default** or **clearance requirement by default**, or leave either option unchecked (no tick) to manually add as required.
- As required, select the **group** or **groups** the condition to be added and then ADD GROUP.

This condition was added on these groups:

Select Groups  ADD GROUP

Title	Action
Health and Waste	
No groups added	

- The condition is added to the Health and Waste group.

This condition was added on these groups:

Select Groups  ADD GROUP

Title	Action
Health and Waste	

- Click on **Save** to complete.

The created condition shows at the top of the Condition list.

- Click on the **Sort** ↓ down arrow to re-position as needed.

Conditions

Planning Condition		Building Condition		Land Division Condition	
Title	Display by default	Clearance requirement by default	Sort		
Stormwater C1 - Example	✓	✗	↓		Show/Edit
Stormwater directed to existing systems	✓	✗	↑ ↓		Show/Edit
Stormwater pipe	✗	✗	↑ ↓		Show/Edit

## Create an Advisory Note

A newly created advisory note is not automatically available from the consent under assessment or 'draft' referral response with conditions; manually add in the **Conditions and Notes** tab for the relevant consent / referral response when applicable.

1. Click on the applicable **Planning Note**, **Building Note** or **Land Division Note** tab.
2. Click on CREATE A REUSABLE ADVISORY NOTE.

### ▼ Advisory Notes

Planning Note	Building Note	Land Division Note
Title	Display by default	Sort
No items available		

CREATE A REUSABLE ADVISORY NOTE

3. Provide a **Title** for the advisory note. The 'Title' is only a reference and will not be shown on the Decision Notification Form (DNF).

\*Title

\*Type

\* Advisory Note

**B I**

Display by default

### Tips for writing a 'title' for the advisory note

To easily identify the applicable advisory note from within the **Conditions and Notes** tab during assessment, the following example 'title' formats can be used:

- Stormwater C1 – insert description
- PC – insert description (*where PC indicates Planning Consent, or BC for Building etc.*)

- Choose the **Type** of note (Planning, Land Division or Building).
- Write the **advisory note** details and select to **display by default** or leave unchecked (no tick) to manually add as required.

## Add new Advisory Note

\*Title

\*Type

\*Advisory Note

**B I**

A statement shall be supplied to Council/Private Certifier by the **Owner** of the land on which the building work is carried out or, the responsible **Licensed Builder**, at the completion of the building work.

A statement pro-forma is included in the Development Approval Paperwork which may be used to submit to Council/Private Certifier via the Development Assessment Portal (DAP).

Display by default

### Tip for writing a variable advisory note

When an advisory note includes variable selections such as the consent (planning, land division, building) or quoting the application number etc., include text to prompt the assessor to include the applicable information. For example: *[choose: Planning consent/Development approval]* or *Development application ID No.s x, x, x.*

- Select either **display by default** or leave either option unchecked (no tick) to manually add as required.
- As required, select the **group** or **groups** the condition to be added and then ADD GROUP.

This advisory note was added on these groups:

Select Groups

Title	Action
✓ Dwellings new or alterations	
No groups added	

- The advisory note is added to the Dwellings new or alterations group.

- Click on **Save** to complete.

This advisory note was added on these groups:

Select Groups

Title	Action
Dwellings new or alterations	



How to...

# Create, modify, and delete a standard condition, note, and reserved matter



The created note shows at the top of the Advisory Note list.

10. Click on the **Sort** ↓ down arrow to re-position as needed.

## ▼ Advisory Notes

Planning Note	Building Note	Land Division Note
Title	Display by default	Sort
Development close to boundaries	✖	↓ ↑
New or modified underground mains construction	✖	↑ ↓
		🗑️
		Show/Edit

## Create a Reserved Matter (planning only)

A newly created reserved matter is not automatically available from the planning consent under assessment; manually added from the **Conditions and Notes** tab for the planning consent when applicable.

1. Click CREATE A REUSABLE RESERVED MATTER.

### ▼ Reserved Matters

Planning Reserved Matter

Title	Reserved Matter	Display by default	Sort		
No items available					

CREATE A REUSABLE RESERVED MATTER

The **Add new Reserved Matter** page shows.

2. Provide a **Title** for the reserved matter. The 'Title' is only a reference and will not be shown on the Decision Notification Form (DNF).
3. Write the **reserved matter** details and select to **display by default** or leave unchecked (no tick) to manually add as required.

\* Title

\* Reserved Matter

**B I**

Details of the landscaping plan the applicant to provide

Display by default

4. As required, select the **group** or **groups** the reserved matter to be added and then **ADD GROUP**.

This reserved matter was added on these groups:

Select Groups  ADD GROUP

Title	Group
<input checked="" type="checkbox"/>	Health and Waste
<input checked="" type="checkbox"/>	New Dwelling

No groups added

5. The reserved matter is added to the New Dwelling group.

This reserved matter was added on these groups:

Select Groups  ADD GROUP

Title	Action
New Dwelling	

CANCEL GO BACK SAVE

6. Click on **Save** to complete.

The created reserved matter shows at the top of the Planning Reserved Matter list.

7. Click on the **Sort** ↓ down arrow to re-position as needed.

### ▼ Reserved Matters

Planning Reserved Matter					
Title	Reserved Matter	Display by default	Sort		
Landscaping	Details of the landscaping plan the applicant to ...	✓	↓		Show/Edit
Waste water site plan	A site plan showing the location of the waste wa ...	✓	↑ ↓		Show/Edit
RM1	test ...	✓	↑		Show/Edit

CREATE A REUSABLE RESERVED MATTER

## Edit Conditions, Notes and Reserved Matters

Changes made to a condition, note or reserved matter will not update a consent under assessment and/or 'draft' referral response with conditions, consents with a decision, or a referral response.

1. Scroll to the required section, e.g. Conditions, Advisory Notes or Reserved Matters.
2. Click on the type, e.g. **Planning**, **Building** or **Land Division**.
3. Click on **Show/Edit**.

As an example, editing planning condition stormwater directed to existing systems.

### Conditions

Planning Condition	Building Condition	Land Division Condition			
Title	Display by default	Clearance requirement by default	Sort		
Structure not to be enclosed	✘	✘	↓	🗑️	Show/Edit
Colours/finishes to complement dwelling	✘	✘	↑ ↓	🗑️	Show/Edit
Stormwater C1 - Example	✔	✘	↑ ↓	🗑️	Show/Edit
Stormwater directed to existing systems	✔	✘	↑ ↓	🗑️	Show/Edit

4. Amend the **title** (as required), add wording to the **description** and/or delete wording that is no longer applicable.

### Modify Condition for Stormwater directed to ex

\* Title

\* Type


\* Condition

**B I**

Il stormwater from the approved structure(s) shall be captured on the subject land or directed to existing stormwater systems on the subject land, such that it does not result in the entry of water into adjoining land.


Display by default  Clearance requirement by default

## Remove condition from a group

5. Click  to remove condition from a group.

This condition was added on these groups:

Select Groups

Title	Action
Health and Waste	


## Add condition to a group

6. As required, select the **group** or **groups** the reserved matter to be added and then **ADD GROUP**.

This condition was added on these groups:

Select Groups

New Dwelling

Title	Action
Health and Waste	

7. The condition is added to the New Dwelling group.

This condition was added on these groups:

Select Groups


Title	Action
Health and Waste	
New Dwelling	

8. Click on **Save** to complete.




The **Saved Conditions, Notes, and Reserved Matters** page displays.

## Delete Conditions, Notes and Reserved Matters

Deleting a condition and/or advisory note will not update the condition and/or note for a consent under assessment, consent with a decision, or response to a referral request.

1. Scroll to the required section, e.g. Conditions, Advisory Notes or Reserved Matters.
2. Click on the type, e.g. **Planning**, **Building** or **Land Division**.
3. Click  to remove. Also removes the condition, note or reserved matter from a group(s).

### ▼ Reserved Matters

Planning Reserved Matter					
Title	Reserved Matter	Display by default	Sort		
Landscaping	Details of the landscaping plan the applicant to ...	✓	↓		<a href="#">Show/Edit</a>
Waste water site plan	A site plan showing the location of the waste wa ...	✓	↑ ↓		<a href="#">Show/Edit</a>
RM1	test ...	✓	↑		<a href="#">Show/Edit</a>

[CREATE A REUSABLE RESERVED MATTER](#)

## Create a Group

The 'Group' option allows you to create a group made up of a combination of Condition, Notes and/or Reserved Matters (only planning), for use in the Conditions and Notes tab during consent assessment to enable a bulk upload required conditions, notes and/or reserved matters versus individually.

1. Click **CREATE A NEW GROUP**.

### Groups

Planning Group	Building Group	Land Division Group
Title		
Health and Waste		
		Show/Edit
<input type="button" value="CREATE A NEW GROUP"/>		

2. The **Add New Group** page shows.
3. Give the **Group** a name, e.g. Health and Waste.

### Add New Group

* Name	Health and Waste
* Type	--- Select One ---
* Status	Active
Notes/Remarks	

4. Choose the **Type** of group (Planning, Land Division or Building).
5. Leave the 'Active' default status.
6. Provide a **note or remarks** about the groups purpose and when to use. This information is internal only.

### Add New Group

* Name	Health and Waste
* Type	Planning Consent
* Status	Active
Notes/Remarks	Waste water specific conditions, notes and reserved matters

59/1000

7. Select required **Conditions** (default), **Advisory Notes** and **Reserved Matters** tab.
8. Click on **Select Conditions** field and then start typing the 'title' of the condition/s.
9. Click on one or multiple conditions to include in the new group.
10. Click **ADD CONDITION TO GROUP**.

Select Condition ? Stormwater pipe, Stormwater directed to existing systems ✕ ▼ ADD CONDITION TO GROUP

Added Conditions

Title	Display By Default	Clearance requirement met?	Action
No items available			

11. The **Added Conditions** shows the selected conditions.
12. Repeat the steps to add an advisory note, or reserved matter (as required).

### Added Conditions

Title	Display By Default	Clearance requirement met?	Action
Stormwater pipe	✕	✕	🗑️
Stormwater directed to existing systems	✔️	✕	🗑️

CANCEL

SAVE

## Preview the Group conditions, notes and reserved matters

13. Click the **Preview Conditions and Notes** link.

[Preview Conditions and Notes](#)

Conditions | Advisory Notes | Reserved Matters

Select Condition ? *Select one or more items* ▼ ADD CONDITION TO GROUP



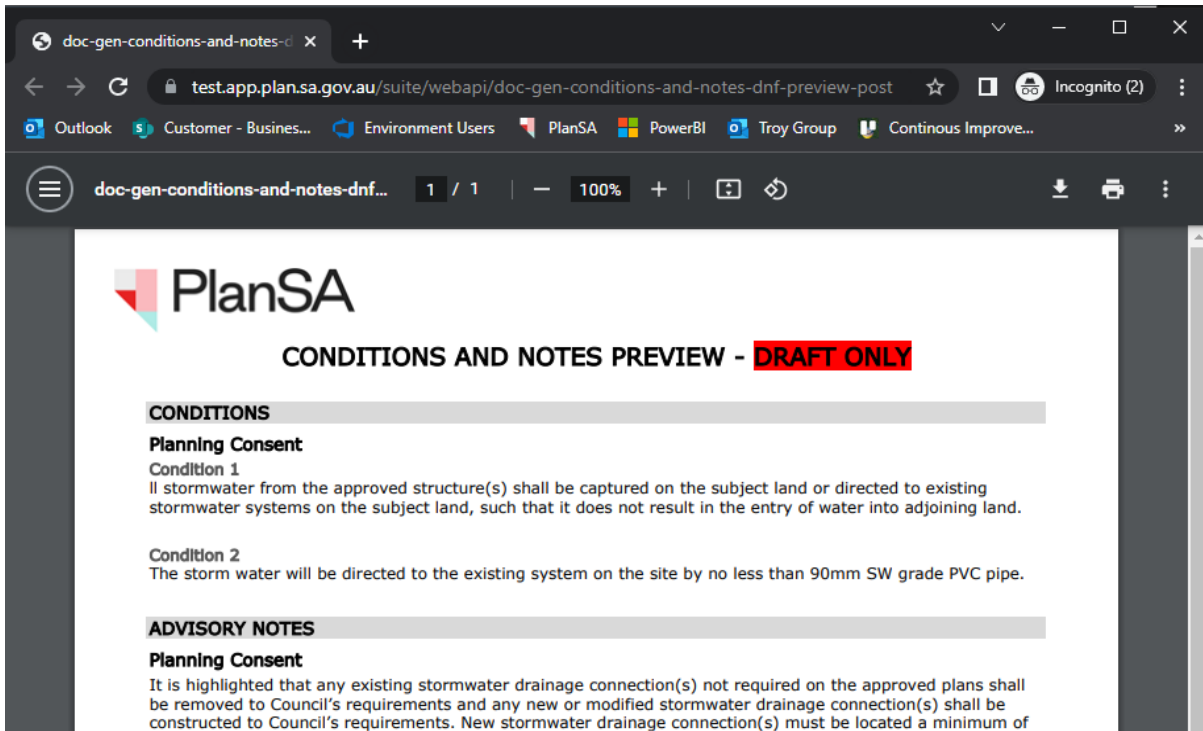
How to...

# Create, modify, and delete a standard condition, note, and reserved matter



The 'Conditions and Notes Preview – DRAFT ONLY' document opens in a new browser tab or available as a download.

14. Review the contents and close.



15. Click **SAVE** to create the group.

## Add New Group

\* Name: Health and Waste

\* Type: Planning Consent

\* Status: Active

Notes/Remarks: Waste water specific conditions, notes and reserved matters (59/1000)

[Preview Conditions and Notes](#)

Conditions | Advisory Notes | Reserved Matters

Select Condition: *Select one or more items* | [ADD CONDITION TO GROUP](#)

**Added Conditions**

Title	Display By Default	Clearance requirement met?	Action
Stormwater pipe	✘	✘	🗑️
Stormwater directed to existing systems	✔️	✘	🗑️

[CANCEL](#) | [SAVE](#)

How to...

# Create, modify, and delete a standard condition, note, and reserved matter



16. Click **YES** to create the group or **NO** to make further changes.

Are you sure you want to create the new group?

The **Saved Conditions, Notes and Reserved Matters** page shows, and the Groups section shows the added group.

## Groups

Planning Group Building Group Land Division Group

Title		
Health and Waste		<a href="#">Show/Edit</a>

CREATE A NEW GROUP

## Modify a Group

Use to update the group name, change the status of the group to 'Inactive', update notes or remarks, add or remove a condition, note or reserved matter. The updates made to a group will not change an in-progress assessment added conditions, notes or reserved matters (planning).

1. Click **Show/Edit** against the Group being modified.

### Groups

Planning Group	Building Group	Land Division Group
Title	Active?	
Health and Waste	✓	Show/Edit
New Dwelling	✓	Show/Edit

CREATE A NEW GROUP

2. The **Modify Group for New Dwelling** page is shown.

### Modify Group for New Dwelling

\* Name: New Dwelling

\* Type: Planning Consent

\* Status: Active

Notes/Remarks: 0/1000

[Preview Conditions and Notes](#)

Conditions | Advisory Notes | Reserved Matters

Select Condition: *Select one or more items* [ADD CONDITION TO GROUP](#)

#### Added Conditions

Title	Display By Default	Clearance requirement met?	Action
Colours/finishes to complement dwelling	✗	✗	✖
Structure not to be enclosed	✗	✗	✖

CANCEL [SAVE](#)

## Inactivate a Group

Changing the status of a group to 'Inactive' will hide the group in the **Conditions and Notes** tab for the consent under-assessment.

3. Click on the status field and change to inactive.

\* Name

\* Type

\* Status

Notes/Remarks

## Add a condition, note or reserved matter to a group

4. Click on the required tab, e.g. **Reserved Matters**.
5. Click in the **Select Reserved Matter** field to search and select one or more reserved matters to add to the group, then ADD RESERVED MATTER TO GROUP.

Conditions    Advisory Notes    **Reserved Matters**

Select Reserved Matter

Added Reserved Matters

Title	Display By Default	Clearance requirement met?	Action
No items available			

The **Added Reserved Matters** shows the selected reserved matter(s) and the 'Preview Conditions and Notes' link is available. As required, preview the conditions and notes before saving the updates.

[Preview Conditions and Notes](#)


Conditions    Advisory Notes    **Reserved Matters**

Select Reserved Matter



**Added Reserved Matters**

Title	Display By Default	Clearance requirement met?	Action
Waste water site plan	✔	✘	

## Remove a condition, note or reserved matter from a group

6. Click on the required tab, e.g. **Advisory Notes**.
7. Click  to delete the note from the group.

[Preview Conditions and Notes](#)

Title	Display By Default	Action
Development close to boundaries	✘	
New or modified underground mains construction	✘	

## Preview conditions and notes

8. Click the **Preview Conditions and Notes** link.

The 'Conditions and Notes Preview – DRAFT ONLY' document opens in a new browser tab or available as a download.

9. Review the contents and close.

**PlanSA**

**CONDITIONS AND NOTES PREVIEW - DRAFT ONLY**

**CONDITIONS**

**Planning Consent**

**Condition 1**  
 All stormwater from the approved structure(s) shall be captured on the subject land or directed to existing stormwater systems on the subject land, such that it does not result in the entry of water into adjoining land.

**Condition 2**  
 The storm water will be directed to the existing system on the site by no less than 90mm SW grade PVC pipe.

**ADVISORY NOTES**

**Planning Consent**  
 It is highlighted that any existing stormwater drainage connection(s) not required on the approved plans shall be removed to Council's requirements and any new or modified stormwater drainage connection(s) shall be constructed to Council's requirements. New stormwater drainage connection(s) must be located a minimum of

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## Create, modify, and delete a standard condition, note, and reserved matter



Government of South Australia

Department for Trade  
and Investment

PlanSA

Version 1.3

10. Click **SAVE** to update.

11. Click **YES** to update the group or **NO** to make further changes.

Are you sure you want to update the group?

---

The **Saved Conditions, Notes and Reserved Matters** page shows.

## Export to excel a report of the standard conditions, notes and reserved matters

1. Click **EXPORT REPORT**.

### Saved Conditions, Notes, and Reserved Matters

[Help for this section](#)

Use this screen to create a collection of reserved matters, conditions and advisory notes that you can easily add to documents (with the ability to edit each instance as required).  
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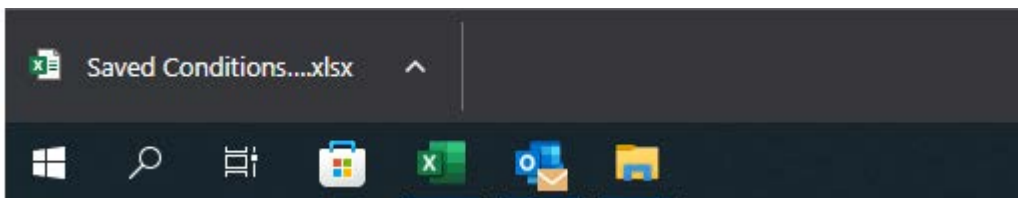
Search by keyword  **SEARCH** **CLEAR SEARCH FILTER** **EXPORT REPORT**

▼ **Conditions**

Planning Condition
Building Condition
Land Division Condition

Title	Display by default	Clearance requirement by default	Sort		
Planning Condition	✔	✔	↓	🗑️	Show/Edit
in accordance with plans	✔	❌	↑↓	🗑️	Show/Edit

2. Open the **Saved Conditions ... xlsx** download at the bottom of the page.



3. Opens Excel showing the Conditions tab, and a separate tab for Notes, Reserved Matters and Groups.

1	Title	Consent Type	Condition	Is Default Display	Is Clearance Requested
2	in accordance with plans	Planning Consent	The herein approved developer	Yes	No
3	Formatted Condition	Planning Consent	This planning condition is using th	Yes	No
4	Condition1	Planning Consent	Planning Condition 1	Yes	No
5	Condition2	Planning Consent	Planning Condition 2	Yes	No
6	Condition3	Planning Consent	Planning Condition 3	Yes	No
7	Condition4	Planning Consent	Planning Condition 4	Yes	No