

## Background

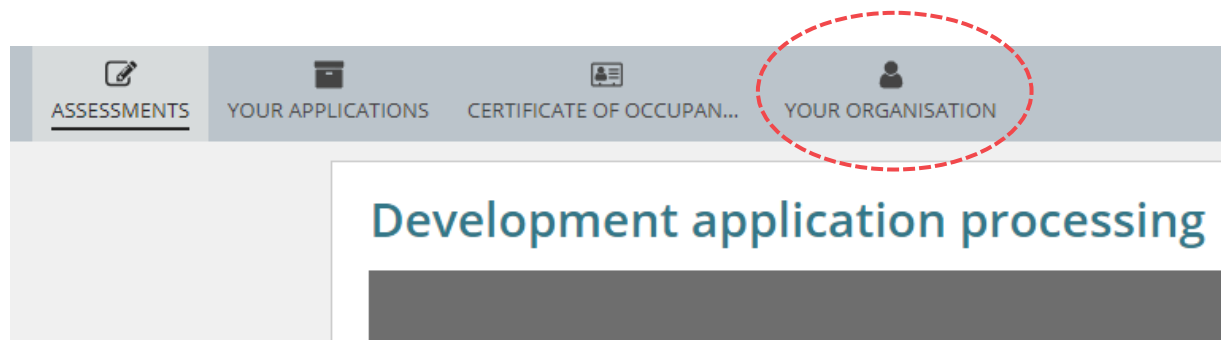
The setting up of your organisation's standard conditions and notes eliminates the need for manual entries during an assessment or when responding to a referral, and ensures the condition and/or note wording is consistently used.

### 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.



## Create a reusable condition

### Information:

A newly created condition is not automatically available from within an in-progress assessment and/or referral request. It will need to be manually added from within the **Conditions and Notes** tab for the relevant consent / referral response when applicable.

1. Click on **Your Organisation** within the Assessment dashboard.
2. Click on **Saved Conditions and Notes** to show pre-existing conditions and notes.

Development application processing

This is the


# TRAINING

Start a new application


Access an application submitted by someone else

Submit mandatory building notification


Submit mandatory Re-Inspection notification

**Org User Profile**

**Saved Conditions & Notes**

**User Management**

3. Click on the applicable **Planning Condition**, **Building Condition** or **Land Division Condition** filter.
4. Click on **Create a Reusable Condition**.

### ▼ Conditions

Planning Condition	Building Condition	Land Division Condition			
Title	Display by default	Clearance requirement by default	Sort		
AGD - Example Condition - Development in Accordance With Approved Plans	⊘	⊘	↑ ↓	🗑	<a href="#">Show/Edit</a>
AGD - Example Reserved Matter	⊘	⊙	↑ ↓	🗑	<a href="#">Show/Edit</a>
AGD - Practice Direction 12 Condition - Replacement Trees	⊘	⊘	↑ ↓	🗑	<a href="#">Show/Edit</a>
AGD - Practice Direction 12 Condition - Payment in Lieu of Replacement Trees	⊘	⊘	↑ ↓	🗑	<a href="#">Show/Edit</a>
AGD - Practice Direction 12 Condition - Division of land in an EPPA	⊘	⊘	↑ ↓	🗑	<a href="#">Show/Edit</a>
AGD - Practice Direction 12 Condition - Creation of Fortifications	⊘	⊘	↑ ↓	🗑	<a href="#">Show/Edit</a>
AGD - Practice Direction 12 Condition - Urban Tree Canopy Overlay - Tree Planting	⊘	⊘	↑ ↓	🗑	<a href="#">Show/Edit</a>
AGD - Practice Direction 12 Condition - Urban Tree Canopy Overlay - Offset Scheme	⊘	⊘	↑ ↓	🗑	<a href="#">Show/Edit</a>

< 1 - 10 of 11 >

CREATE A REUSABLE CONDITION

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

\* Title  [^ Hide Detail](#)

\* Type

\* Condition 

B I ☰ ☰ *I<sub>x</sub>*

 Display by default  Clearance requirement by default

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

To easily identify the applicable condition from within the **Conditions and Notes** tab during assessment, 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.*)

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

For example: a condition with 'planning' will display as the default 'type', additional options can be selected from the drop-down menu during the assessment of a planning consent.

\* Title  [^ Hide Detail](#)

\* Type

\* Condition 

- Planning Condition
- Land Division Condition
- Building Condition

 Display by default  Clearance requirement by default

7. Write the **condition** details and select either **display by default** or **clearance requirement by default**, or leave either option unchecked (no tick) to manually add as required.

\* Title  [^ Hide Detail](#)

\* Type

\* Condition 

B I ☰ ☰ *I<sub>x</sub>*

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.*

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

The created condition shows at the top of the list.

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

#### ▼ Conditions

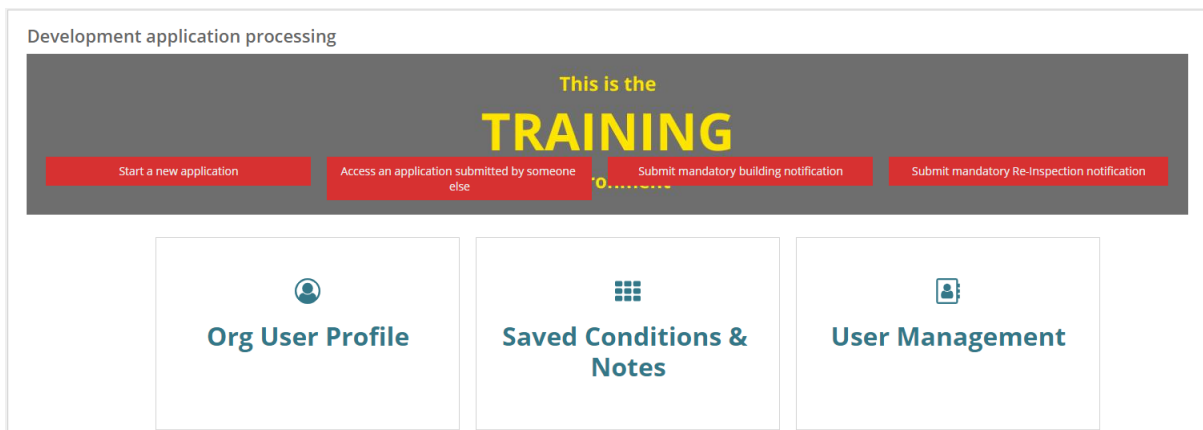
Planning Condition		Building Condition		Land Division Condition	
Title	Display by default	Clearance requirement by default	Sort		
Waste water	⊗	⊗	↑ ↓	⊗	Show/Edit
AGD - Example Condition – Development in Accordance With Approved Plans	⊗	⊗	↑ ↓	⊗	Show/Edit

## Create a reusable Advisory Note

### Information:

A newly created advisory note is not automatically available from within an in-progress assessment and/or referral request. It will need to be manually added from within the **Conditions and Notes** tab for the relevant consent / referral response when applicable.

1. Click on **Your Organisation** within the Assessment dashboard.
2. Click on **Saved Conditions & Notes** to create a new condition and/or advisory note.



3. Click on the applicable **Planning Note**, **Building Note** or **Land Division Note** filter.
4. Click on **Create a Reusable Advisory Note**.

### ▼ Advisory Notes

Planning Note	Building Note	Land Division Note		
Title	Display by default	Sort		
AGD - Example Advisory Note - Variation applications	✖	↑ ↓	🗑️	Show/Edit
AGD - Example Appeal rights note	✖	↑ ↓	🗑️	Show/Edit
Test	✖	↑ ↓	🗑️	Show/Edit

CREATE A REUSABLE ADVISORY NOTE

- 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  [^ Hide Detail](#)

\* 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).

For example: a condition with 'building' will display as the default, additional options can be selected from the drop down menu during the assessment of a building consent.

\* Title  [^ Hide Detail](#)

\* Type

\* Advisory Note

Planning Note

Land Division Note

Building Note

- Write the **advisory note** details and select to **display by default** or leave unchecked (no tick) to manually add as required.

\* Title  [^ Hide Detail](#)

\* Type

\* Advisory Note

**B I**

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.*

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

The created notes shows at the top of the list.

9. 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	
Waste water	⊘	↑ ↓ ⊘	Show/Edit
AGD - Example Advisory Note - Variation applications	⊘	↑ ↓ ⊘	Show/Edit
AGD - Example Appeal rights note	⊘	↑ ↓ ⊘	Show/Edit
Test	⊘	↑ ↓ ⊘	Show/Edit

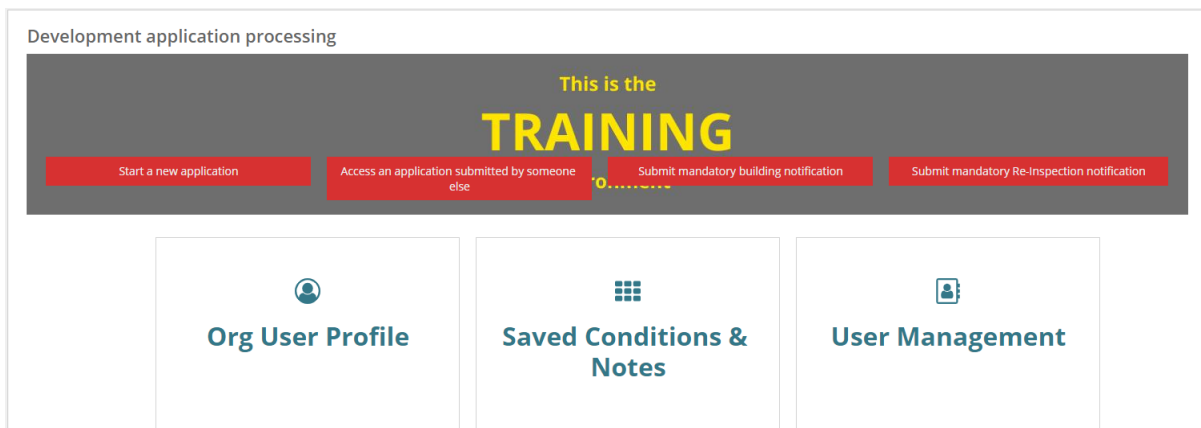
CREATE A REUSABLE ADVISORY NOTE

## Edit Conditions and Advisory Notes

### Information:

Changes made to a condition and/or advisory note will not update the condition and/or advisory note within – a consent under assessment, consent were a decision made, or a referral response.

1. Click on **Your Organisation** within the Assessment dashboard.
2. Click on **Saved Conditions & Notes** to edit a condition and/or advisory note.



3. Click on the applicable **Planning Condition or Note, Building Condition or Note or Land Division Condition or Note** filter.
4. Click on **Show/Edit** against the condition or advisory note.

### Conditions

Planning Condition		Building Condition		Land Division Condition	
Title	Display by default	Clearance requirement by default	Sort		
Waste water	⊗	⊗	↑ ↓	🗑️	Show/Edit
AGD - Example Condition – Development in Accordance With Approved Plans	⊗	⊗	↑ ↓	🗑️	Show/Edit






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

### Modify Condition for Waste water

\* Title

\* Type

\* Condition

**B I**   

insert your text

**Make your changes**

Display by default  Clearance requirement by default

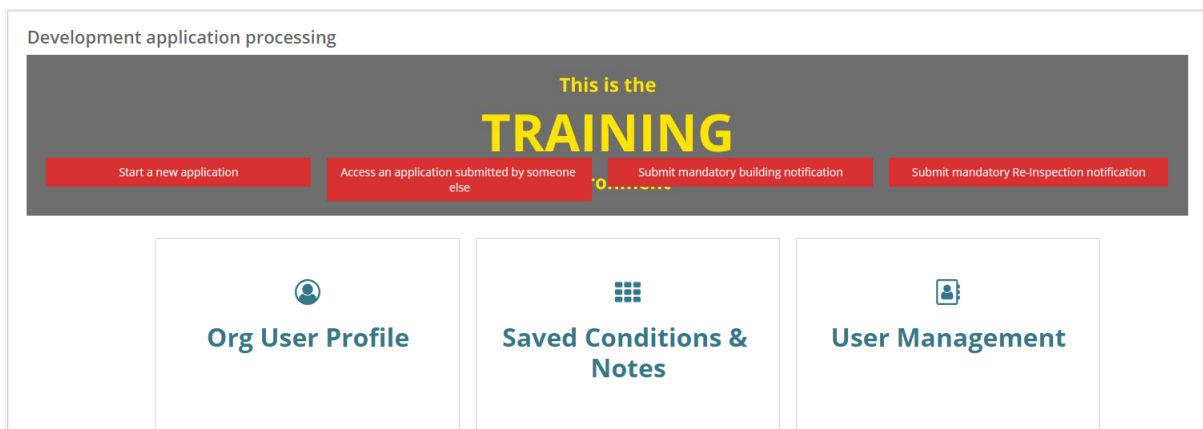
- Click on **Save** to complete.

## Delete Conditions and Advisory Notes

### Information:

Deleting a condition and/or advisory note will not update the condition and/or note within a consent under assessment, consent were a decision has been made, or response to a referral request.

1. Click on **Your Organisation** within the Assessment dashboard.
2. Click on **Saved Conditions & Notes** to delete a condition and/or advisory note.



3. Click on the applicable **Planning Condition or Note**, **Building Condition or Note** or **Land Division Condition or Note** filter.
4. Click on the **Trash** icon (delete) against the condition and/or advisory note.

Noting, there is no pop-up message to confirm the deletion.

### Conditions

Planning Condition		Building Condition		Land Division Condition	
Title	Display by default	Clearance requirement by default	Sort		
Waste water	⊘	⊘	↑ ↓	🗑️	Show/Edit
AGD - Example Condition - Development in Accordance With Approved Plans	⊘	⊘	↑ ↓	🗑️	Show/Edit