

## Background

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An internal referral is distributed during the assessment of a consent (Planning, Land Division or Building) to team member(s) with expertise within a specialist team, such as engineers, arborists, or waste water management etc.

The team member(s) within these specialist teams will require to set-up an ePlanning user account to receive and action an internal referral. When a staff member does not have an account, they must contact the 'Organisation Administrator' to arrange set-up.

Visibility of the team's internal referral allocations is available through an 'Internal Referral Assigned' report and additionally can be utilised as a dashboard for team members to manage and perform their responses to an internal referral.

## Included instructions

- [View the Internal Referral Assigned report](#)
- [Use the filters to show applications by type of internal referral, response by staff member and date range](#)
- [Review the internal referral details and re-assign to a staff member](#)

## Related Instructions

- How to – Add and distribute an internal referral request
- How to – Reassign an internal referral to another team member
- How to – Respond to an internal referral request
- How to – Review and acknowledge an internal referral response

## Before you begin

Log in to the ePlanning system, the **Assessments** dashboard will show.

## View the Internal Referral Assigned report

1. Click on the **Reporting** tab.

Development application processing Search

This is the

# TRAINING

Submit mandatory building notification
Submit mandatory Re-Inspection notification
Reporting

FOR YOUR ACTION (60)
ASSESSMENT IN PROGRESS (138)
WAITING (35)
UPCOMING (8)
COMPLETED (77)
BUILDING NOTIFICATIONS (0)
RE-INSPECTION NOTIFICATIONS (0)

2. Click on **Internal Referral Assigned**.

### Reports

- Council Application Management Reporting (PowerBI) ⓘ
- Unallocated Applications ⓘ
- Days Left in Verification ⓘ
- Referral Agency Response Days Left ⓘ
- Relevant Authority Referral Response Days Left ⓘ
- Public Notification Days Left ⓘ
- Allocated Applications ⓘ
- Days Left Till Decision ⓘ
- Inspection Allocated Applications ⓘ
- Internal Referral Assigned ⓘ

The **Internal Referral Assigned** table lists all applications with an internal referral assigned or not assigned to a staff member.

### Internal Referral Assigned

This report displays all the applications with internal referrals assigned

⌵ Show Filters

Applicat ion ID ↑	Consent ID	Consent Type	Relevant Authority	Location	Nature of Development	Requested By	Internal Referral Type	Requested Date
20000072	5936	PC	SPC	LOT 200 RAILWAY TCE S MARREE SA 5733	Alterations and additions to the Marree Hotel	Brett Miller		22 May 2020
20000382	6569	PC	SPC	LOT 11 EAST TCE PARACHILNA SA 5730, LOT 11 EAST TCE PARACHILNA SA 5730	house, with shed and verandah	Sascha Woods		8 Jul 2020

## Use the filters to show applications by type of internal referral, response by staff member and date range

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1. Click on **Show filters** to show the filtering options.

### Internal Referral Assigned

This report displays all the applications with internal referrals assigned

[^ Hide Filters](#)

<p><b>Internal Referral Type</b></p> <p>Select Referral Type <span style="float: right;">▼</span></p>	<p><b>Requested Date</b></p> <p>From <input type="text" value="dd/mm/yyyy"/></p> <p>To <input type="text" value="dd/mm/yyyy"/></p>	<p><b>Response Date</b></p> <p>From <input type="text" value="dd/mm/yyyy"/></p> <p>To <input type="text" value="dd/mm/yyyy"/></p>
<p><b>Responded By</b></p> <p>Type to select the user <input type="text"/></p>		
<p><b>Response</b> <input type="checkbox"/> Is Null</p>		
<input type="button" value="CLEAR"/>	<input type="button" value="SEARCH"/>	

2. Use a filter combination to only show applications that match the information entered.

- **Internal Referral Type** when used will only show applications with that chosen type, e.g. Civil Stormwater.
- **Responded By** when used will only show applications for a specific team member nominated by the consent (planning or building) assessing officer.
- **Requested Date** when used will only show applications for that date and/or date range. For e.g., entering '19 March' as a '**From**' date in the search will only show applications from that date onwards.
- **Response Date** when used will only show applications for that date and/or date range. For e.g., entering the '**From**' date as '19 March' and the '**To**' date as '25 March' will only show applications with a response made between the date range specified.
- **Response - Is Null** when used will show applications where the 'responded by' staff member did not provide a response comment.

3. Click on the column heading to sort the applications shown in alphabetical or numeric order based on the internal referral information within.

For e.g., click on the **Responded By** column to alphabetically order the applications by staff member name.

## Review the internal referral details and re-assign to a staff member

Firstly, filter the applications using 'Responded By' to locate internal referrals with a specific staff member nominated to respond.

1. Click on the **Consent ID** number to show the applicable consent.

### Internal Referral Assigned

This report displays all the applications with internal referrals assigned

^ Hide Filters

**Internal Referral Type**

Select Referral Type ▼

**Responded By**

Jeff Sewart ✕

**Response**  Is Null

CLEAR

**Requested Date**

**From**

**To**

**Response Date**

**From**

**To**

SEARCH

Application ID	Consent ID	Consent Type	Relevant Authority	Location	Nature of Development	Requested By	Internal Referral Type	Requested Date	Responded By	Response Date	Response
21000638	18999	PC	SPC	LOT 45 MILLER ST PENONG SA 5690	House and swimming pool and deck	Sascha Woods	Civil Stormwater	22 Mar 2021	Jeff Sewart	23 Mar 2021	Complete
21002284	13673	PC	SPC	LOT 1500 ANDAMOOKA RD ANDAMOOKA STATION SA 5722	Detached Dwelling	Sascha Woods	Civil Stormwater	25 Mar 2021	Jeff Sewart	—	

2. Click on the **Referrals** tab to view the internal referral request.

### Planning Consent for Development Application: 21002284

Summary Documents Fees RFIs **Referrals** Public Notification Conditions and Notes Clocks Decision Appeals Related Actions

Help for this section

< Development application 21002284

3. Click on **Reassign** against the applicable referral request, identified by the **Referral Type** shown.

#### Internal Referrals

Requested By	Referral Type	Requested Date	Respondee	Response Date	Actions
Sascha Woods	Civil Stormwater	25/03/2021	Jeff Sewart		<span style="border: 1px solid #ccc; padding: 2px;">View Reassign</span>
Sascha Woods	Civil Stormwater	25/03/2021	Brett Miller		<span style="border: 1px solid #ccc; padding: 2px;">View Reassign</span>
Sascha Woods	Civil Stormwater	25/03/2021	David Storey		<span style="border: 1px solid #ccc; padding: 2px;">View Reassign</span>

4. Type in the first letters of the staff member's name and then select the matching name.

### Reassign Internal Referral

<p><b>Current Respondee</b> Jeff Sewart</p> <p style="text-align: right;"><a href="#">CANCEL</a></p>	<p><b>New respondee from your organisation *</b></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">dav</div> <ul style="list-style-type: none"> <li>David Lake</li> <li>David Lodge</li> <li style="background-color: #f0f0f0;">David Storey</li> </ul> <p style="text-align: right;"><a href="#">SUBMIT</a></p>
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5. Click on **Submit** to complete the reassignment.

The '**Respondee**' field within the internal referral request shows the assigned staff member's name.

**Internal Referrals**

Requested By	Referral Type	Requested Date	Respondee	Response Date	Actions
Sascha Woods	Civil Stormwater	25/03/2021	David Storey		<a href="#">View</a> <a href="#">Reassign</a>

6. Click **← Back** in the browser to go back to the **Consent – Summary** screen.



7. Click **← Back** in the browser again to go back to the **Internal Referral Assigned** screen.



8. Repeat the steps until all reassignments completed.