

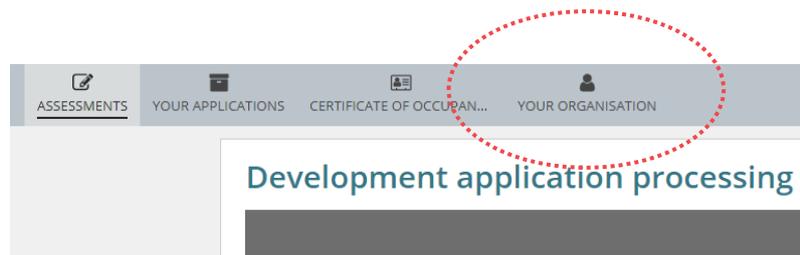
## Background

1

The updating of a PlanSA user's access details (i.e. roles and consent allocations) can only be performed by the 'Organisation Administrator' for the organisation.

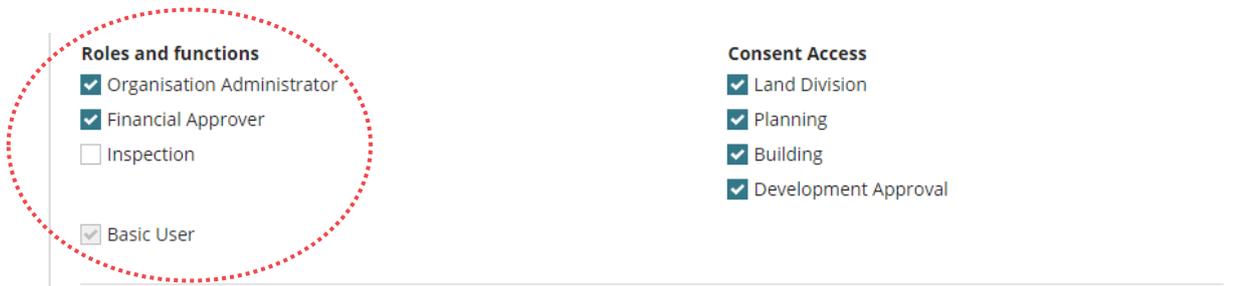
### How do I know if I am an Organisation Administrator?

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



### What is the difference between Roles and Functions?

The **Roles** assigned to a user determines the level of access they have to the DAP (the assessment) workflow. Whereas **Functions** assigned to a user indicate that they are available for selection from a drop-down list of names.



**Function** Is a 'Relevant Authority – Accredited Professional' for this organisation

This function is only available to Independent Assessors (i.e. Accredited Professionals).

A person who is the relevant authority for this organisation is allocated this function and enables their name to be **chosen as the relevant authority** for a consent (Planning and/or Building) during the submitting of a development application.

**Function** Inspection

A person who **performs building inspections** is allocated this function and enables their name to be selectable during the assigning of inspections.

# How to... Update access to PlanSA-DAP for a user



<b>Role</b>	<b>Organisation Administrator</b>	<p>A person with this Role can:</p> <ul style="list-style-type: none"> <li>• Maintain Your Organisation details including Conditions &amp; Notes, User maintenance.</li> <li>• Process a development application – submission through to development approval, includes fee invoicing and payments, variations and appeals, etc.</li> <li>• Approve fee refunds.</li> </ul>
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<b>Role</b>	<b>Financial Approver</b>	<p>A person with this role can:</p> <ul style="list-style-type: none"> <li>• Process a development application – submission through to development approval, includes fee invoicing and payments, variations and appeals, etc.</li> <li>• Approve fee refunds.</li> </ul>
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<b>Role</b>	<b>Basic User</b>	<p>A person with this role can:</p> <ul style="list-style-type: none"> <li>• Process a development application – submission through to development approval, includes fee invoicing and payments, variations and appeals, etc.</li> </ul>
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## What roles and functions can be allocated to a user?

Based on the positions within an organisation the below are suggestions on what user access functions and roles to assign.

Function and Role	Planner	Building Certifier	Team Leader Manager	Administration Staff planning + building	Financial Approver
Is a 'Relevant Authority – Accredited Professional' for this organisation Independent assessors only	+	+			
Inspection		+			
Organisation Administrator At the discretion of the organisation who is assigned the role	+	+	+		
Financial Approver					+
Basic User	+	+	+	+	+

## What is the Consent Access function?

The Consent Access function allows you to 'indicate' the consent types applicable and/or frequently performed by a user, which then makes them selectable from a drop-down list of names for that specific consent; it does not control/restricted access to only the screens applicable to that consent/s.

**Roles and functions**

- Organisation Administrator
- Financial Approver
- Inspection
- Basic User

**Consent Access**

- Land Division
- Planning
- Building
- Development Approval

The 'Allocated Assessor' field drop-down list within the **Assessment status** table is where the relevant user can be selected from a list of names that have been allocated the applicable consent within their user profile.

Assessment status					
Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	Days	
▶ Planning Consent	Assessment panel/Assessment manager at State Planning Commission	br	Awaiting Verification	2	
Land Division Consent	Assessment panel/Assessment manager at City of West Torrens	Gabrielle McMahon	Awaiting Precursor Consent		
Building Consent		Brett Miller	Initialised		
Development Approval for: Planning Consent Land Division Consent Building Consent	City of West Torrens	Brianna Fyffe	Awaiting Precursor Consent		

### What Consent Access should I allocate to a user?

Based on the positions within an organisation the below are suggestions on what 'Consents' to allocate.

Position	Consent Access			
	Land Division	Planning	Building	Development Approval
Planner	+	+		+
Building certifier / officer		+	+	+
Administration Staff	+	+	+	+
Team leader/manager	+	+	+	+

### Included instructions

- [Update Roles and Functions for a user](#)
- [Update Consent Access for a user](#)



- [Link a professional accreditation](#)
- [Delete link a professional accreditation](#)

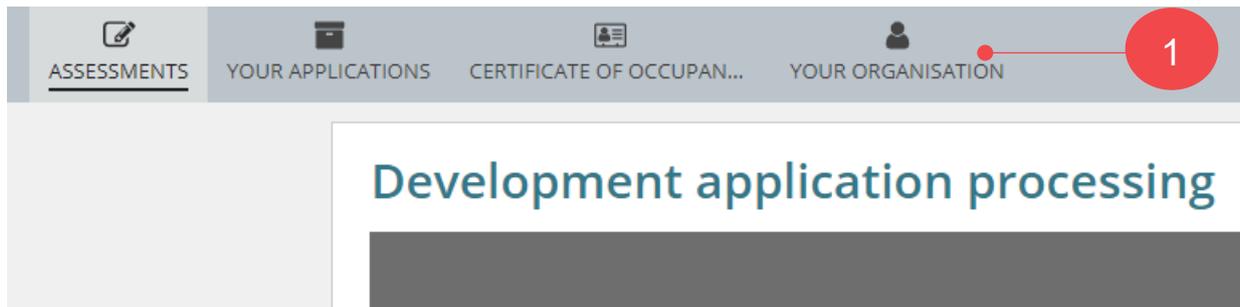
## Related Instructions

Available from the PlanSA Support Library – [Your Organisation Details, Conditions and Users](#) page.

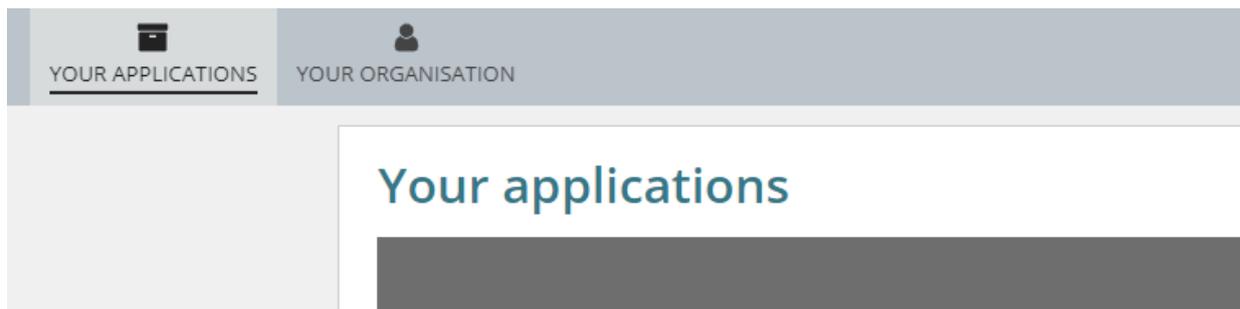
- How to – Create a new PlanSA-DAP user account
- How to – Update personal and contact details for a PlanSA-DAP user
- How to – Deactivate access to PlanSA-DAP for a user
- How to – Reactivate access to PlanSA-DAP for a user
- How to – Request deactivation of a PlanSA-DAP user
- How to – Request a new PlanSA-DAP user account

## Update Roles and Functions for a user

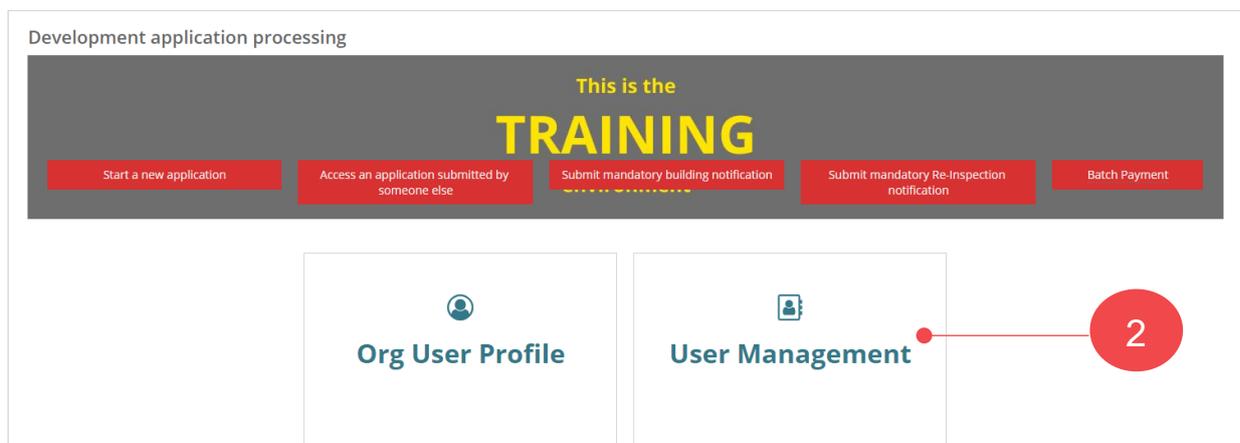
1. Click on **Your Organisation**.



The dashboard image above is for a referral body. If you are an Organisation Administrator for a volume applicant (e.g. building developer, architect, etc.) then the dashboard view will show as per the image below.



2. Click on **User Management**.



Noting, if an Organisation Administrator for a referral body and relevant authority, then an additional option **Save Conditions and Notes** is shown.

# How to...

## Update access to PlanSA-DAP for a user



3. Search for the staff member's user account, either by their first name or surname.
4. Click on the **User Name** to view more details.

6

Development Application Processing

State Planning Commission - Users

wood

User Name	Position	User type
Sascha.Woods@sa.gov.au		Org Admin, Financial Approver

5. Click on **Edit** within the Roles and Functions area.

Roles and functions

- Organisation Administrator
- Financial Approver
- Inspection
- Basic User

Consent Access

- Land Division
- Planning
- Building
- Development Approval

Edit

6. Select or de-select the **Roles and Functions** applicable to the individual.
7. Click on **Submit** to complete the updates.

### Relevant Authority (council & RAP) options

Roles and functions

- Organisation Administrator
- Financial Approver
- Inspection
- Basic User

### Relevant Authority (accredited professional) options

Roles and functions

- Is a "Relevant Authority - Accredited professional" for this organisation
- Organisation Administrator
- Basic User

The list of **Users** table shows the updated 'User Type'. Noting, the individual is not notified of the updates made to their access.

Development Application Processing environment

State Planning Commission - Users

wood Edit organisation >

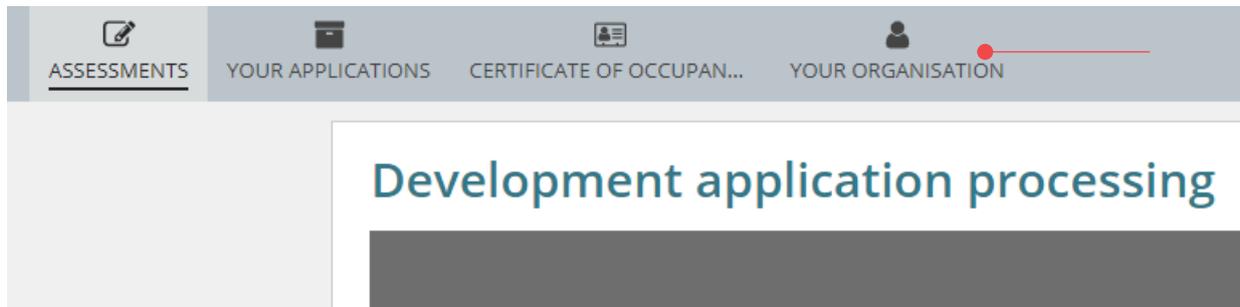
User Name	Position	User type	Consent Access
Sascha.Woods@sa.gov.au		Org Admin	Planning, Development Approval

## Update Consent Access for a user

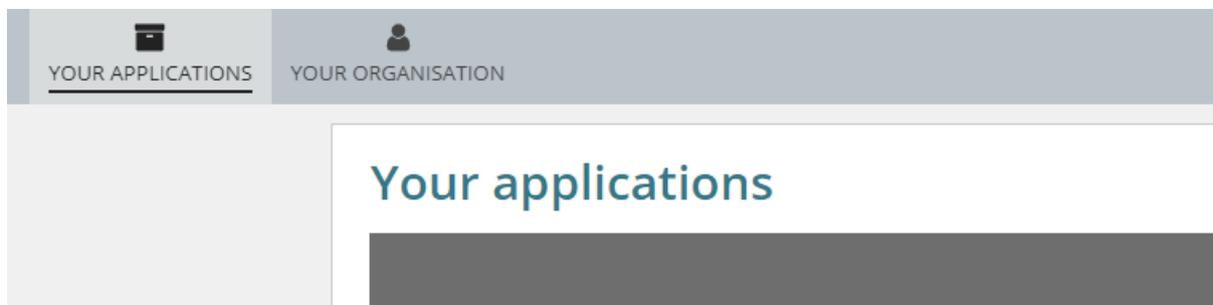
1. Click on **Your Organisation**.

# How to...

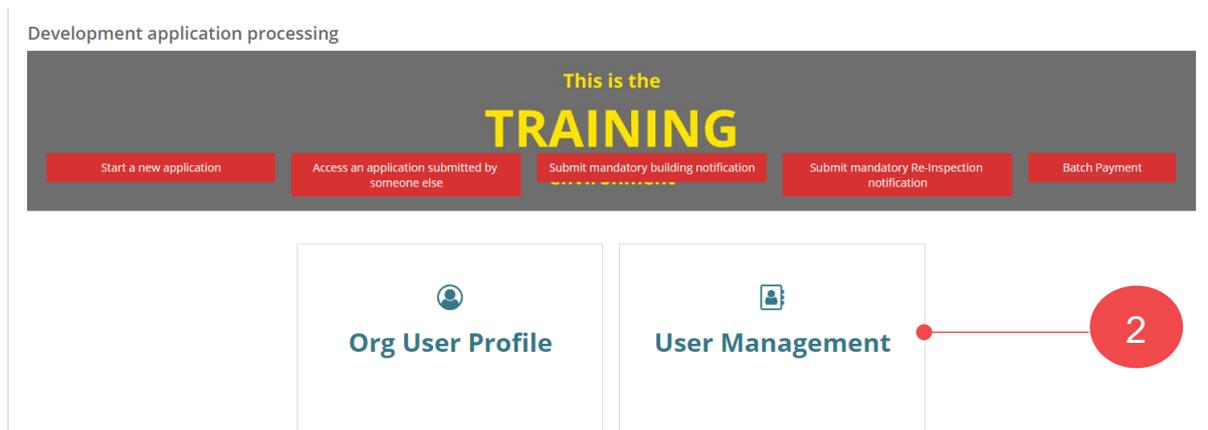
## Update access to PlanSA-DAP for a user



The dashboard image above is for a referral body. If you are an Organisation Administrator for a volume applicant (e.g. building developer, architect etc.) then the dashboard view will show as per the image below.



### 2. Click on **User Management**.



Noting, if an Organisation Administrator for a referral body and relevant authority, then an additional option **Save Conditions and Notes** is shown.

3. Search for the staff member's user account, either by their first name or surname.
4. Click on the **User Name** to view more details.

**Development Application Processing**

State Planning Commission - Users

wood 3

User Name	Position	User type
Sascha.Woods@sa.gov.au <span style="border: 1px solid red; border-radius: 50%; padding: 2px 10px;">4</span>		Org Admin, Financial Approver

5. Click on **Edit** within the Roles and Functions area.

Link DPTI Professional Accreditations >

**Roles and functions**

Organisation Administrator

Financial Approver

Inspection

Basic User

**Consent Access**

Land Division

Planning

Building

Development Approval

Edit 5

6. Select or de-select the **Consent Access** applicable to the individual.
7. Click on **Submit** to complete the updates.

**Consent Access**

Land Division

Planning 6

Building

Development Approval

7 **SUBMIT**

The list of **Users** table shows the updated 'Consent Access'. Noting, the individual is not notified of the updates made to their access.

**Development Application Processing** environment

State Planning Commission - Users

wood Edit organisation >

User Name	Position	User type	Consent Access
Sascha.Woods@sa.gov.au		Org Admin	Planning, Development Approval

## Link a professional accreditation

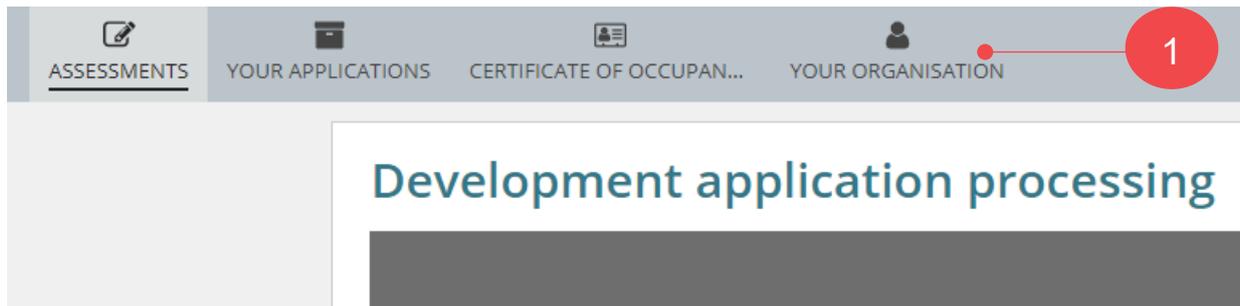
# How to...

## Update access to PlanSA-DAP for a user

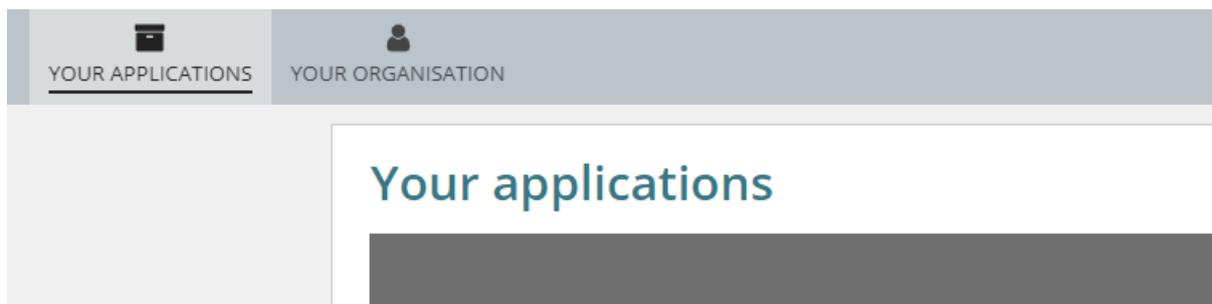


For individuals within the organisation that have professional accreditation under the Accredited Professionals scheme can have their accreditation linked to their user account.

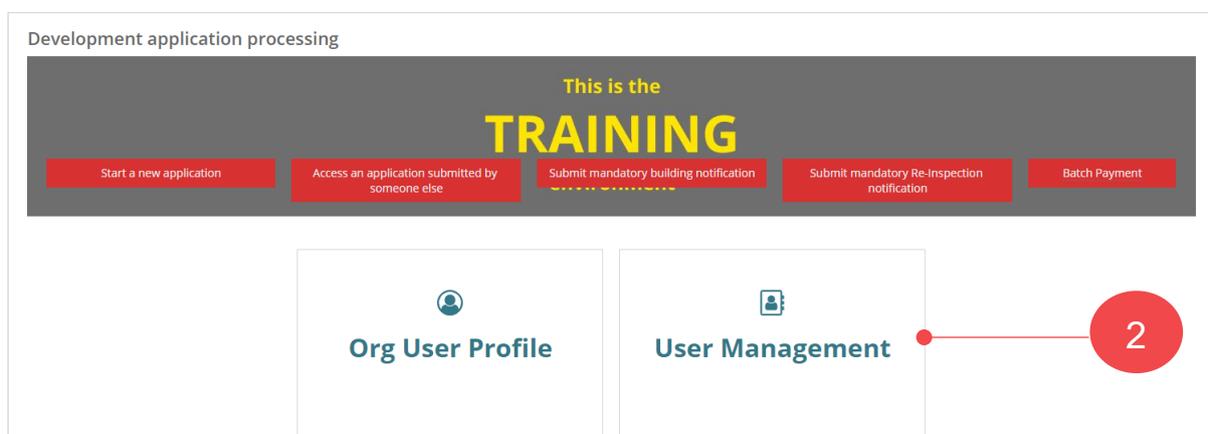
1. Click on **Your Organisation**.



The dashboard image above is for a referral body. If you are an Organisation Administrator for a volume applicant (e.g. building developer, architect, etc.) then the dashboard view will show as per the image below.



2. Click on **User Management**.



Noting, if an Organisation Administrator for a referral body and relevant authority, then an additional option **Save Conditions and Notes** is shown.

# How to...

## Update access to PlanSA-DAP for a user



3. Search for the individual's user account, either by their first name or surname.
4. Click on the **User Name** to view more details.

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**Development Application Processing**

**District Council of Robe - Users**  **3**

User Name	Position	User type
<a href="#">epn.dawsonda@sa.gov.au</a> <b>4</b>	Plan consultant	Org Admin, Financial Approver

5. Click on link **DPTI Professionals Accreditations** to show more information.
6. Type in the individual's accreditation ID and then click on **Lookup** to return the accreditation details.

Link DPTI Professional Accreditations **5**

Accreditation ID  **LOOKUP** **6** [View list of accredited professionals here](#)

7. Click on **Confirm and Link** when the returned accreditation details belong to the individual.

Link DPTI Professional Accreditations

Accreditation ID  **LOOKUP** [View list of accredited professionals here](#)

**5**  
Planning Levelone  
Accredited professional-planning level 1

**CANCEL** **CONFIRM AND LINK** **7**

The linked professional accreditation is created.

Link DPTI Professional Accreditations

Accreditation ID  **LOOKUP** [View list of accredited professionals here](#)

**Linked Professional Accreditations**

Id	Name	Accreditation Level(s)	Status	End Date	
5	Planning Levelone	Accredited professional-planning level 1	Registered	29 Jan 2021	

8. Repeat the steps until all accreditations are linked.

The 'Is a "Relevant Authority – Accredited Professional" for this organisation' function is only available to Independent Assessors (i.e. Accredited Professionals).

A person who is the relevant authority for this organisation is allocated this function and enables their name to be chosen as the relevant authority for a consent (Planning and/or Building) when a development application is being submitted.

- Click on the checkbox to indicate the individual 'Is a "Relevant Authority – Accredited Professional" for this organisation'.

### Alternate

Leave the checkbox unchecked to indicate they are not the "Relevant Authority – Accredited Professional" for this organisation'.

- Click on **Submit** to complete the linking.

Link DPTI Professional Accreditations ▼

Accreditation ID   [View list of accredited professionals here](#)

**Linked Professional Accreditations**

Id	Name	Accreditation Level(s)	Status	End Date	
232	Accredited ProfTraining	Accredited professional-building level 1	Registered	10 Jul 2021	

**Roles and functions**

Is a "Relevant Authority - Accredited professional" for this organisation 9

Organisation Administrator

Basic User

**Consent Access**

Land Division

Planning

Building

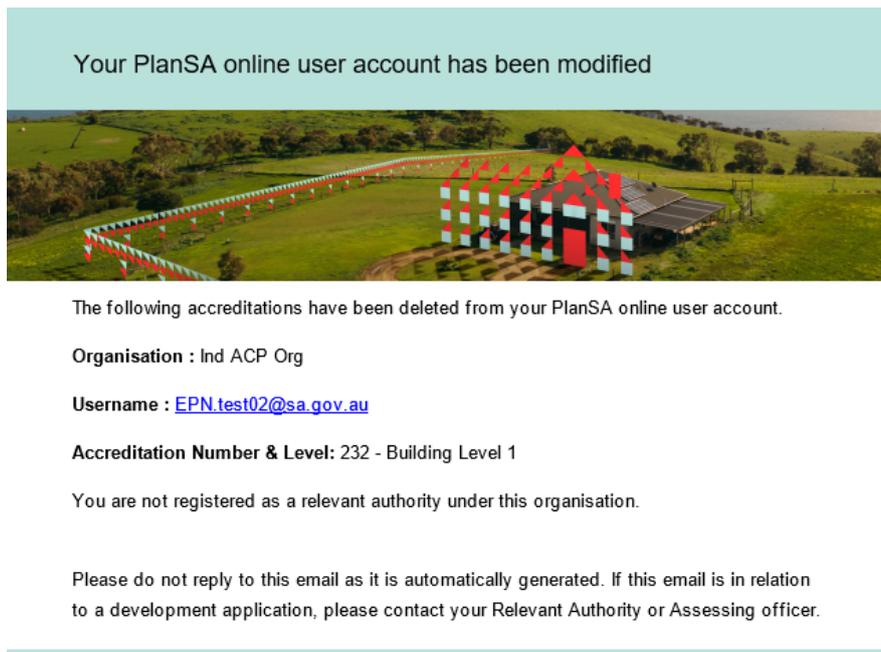
Development Approval

10

## Delete the link to a professional accreditation

12

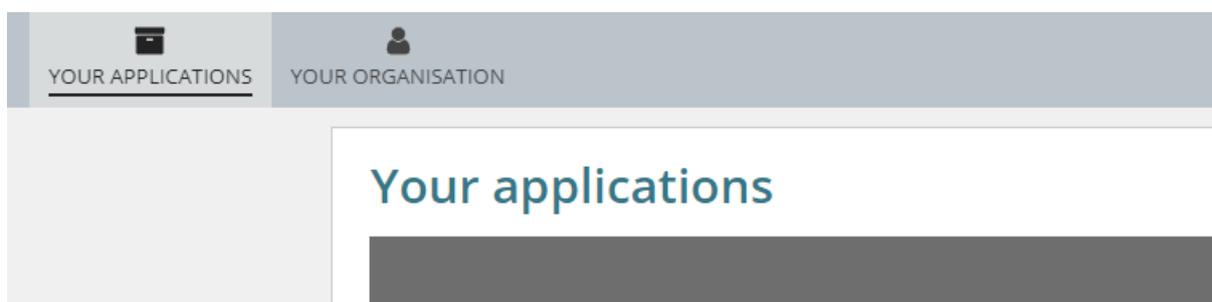
When an individual's professional accreditation is not being renewed, the link to their professional accreditation can be deleted. They will receive an email notifying them of the accreditations deleted from their online user account.



1. Click on **Your Organisation**.



The dashboard image above is for a referral body. If you are an Organisation Administrator for a volume applicant (e.g. building developer, architect, etc.) then the dashboard view will show as per the image below.



2. Click on **User Management**.

# How to... Update access to PlanSA-DAP for a user



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

Batch Payment

Org User Profile

User Management 2

Noting, if an Organisation Administrator for a referral body and relevant authority, then an additional option **Save Conditions and Notes** is shown.

3. Search for the individual's user account, either by their first name or surname.
4. Click on the **User Name** to view more details.

**Development Application Processing**

**District Council of Robe - Users**  3

User Name	Position	User type
<a href="#">epn.dawsonda@sa.gov.au</a> <span style="color: red; font-size: 24px; border-radius: 50%; padding: 2px 10px; margin-left: 5px;">4</span>	Plann... ultant	Org Admin, Financial Approver

5. Click on the trashcan icon against the applicable accreditation level.

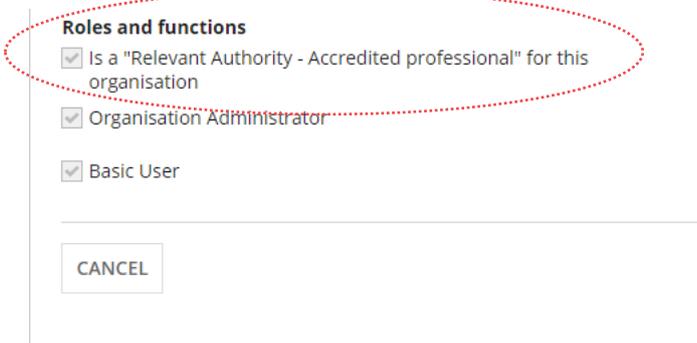
Link DPTI Professional Accreditations

Accreditation ID   [View list of accredited professionals here](#)

**Linked Professional Accreditations**

Id	Name	Accreditation Level(s)	Status	End Date	
5	Planning Levelone	Accredited professional-planning level 1	Registered	29 Jan 2021	<span style="color: red; font-size: 24px; border-radius: 50%; padding: 2px 10px; margin-left: 10px;">5</span>

The linked record is removed and the 'Is a "Relevant Authority – Accredited professional" for this organisation' function is removed for individuals that are an independent assessor and/or a staff member for an independent assessor's organisation.

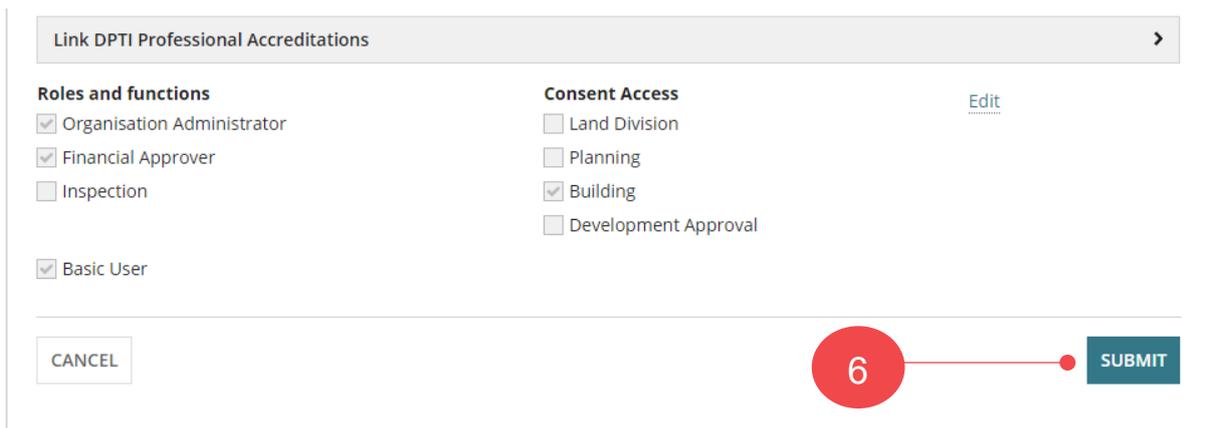


**Roles and functions**

- Is a "Relevant Authority - Accredited professional" for this organisation
- Organisation Administrator
- Basic User

CANCEL

6. Click on **Submit** to complete the updates.



Link DPTI Professional Accreditations >

<b>Roles and functions</b>	<b>Consent Access</b>	<a href="#">Edit</a>
<input checked="" type="checkbox"/> Organisation Administrator	<input type="checkbox"/> Land Division	
<input checked="" type="checkbox"/> Financial Approver	<input type="checkbox"/> Planning	
<input type="checkbox"/> Inspection	<input checked="" type="checkbox"/> Building	
<input checked="" type="checkbox"/> Basic User	<input type="checkbox"/> Development Approval	

CANCEL 6 SUBMIT