

Manage Team Workload

Version 3.0



Government of South Australia

Department for Housing
and Urban Development

Table of Contents

1. Work Allocation3

 Locate Submitted Development Application4

 Determine Development Type and Complexity5

 Viewing Current Workload7

 Allocating a Team Member9

 Received Consent for Application Allocation..... 10

2. Reallocation of Work 11

 Deleting and Reallocating a Team Member 11

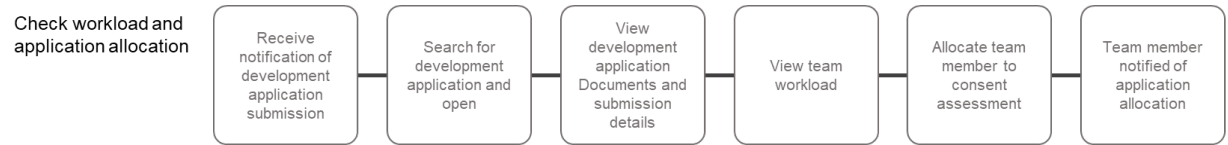
 Reallocating Application Consent to Team Leader or Manager 13

 Received Consent for Application Allocation..... 14

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).



Locate Submitted Development Application

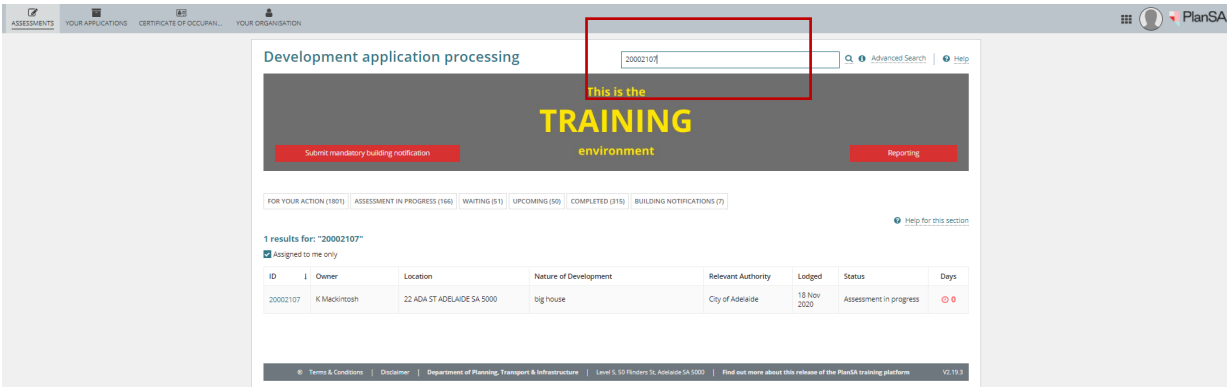
On submission of a development application a notification email (shown below) is delivered to your organisations group mailbox; subject contains the application number and a link directly to the lodge application.

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.

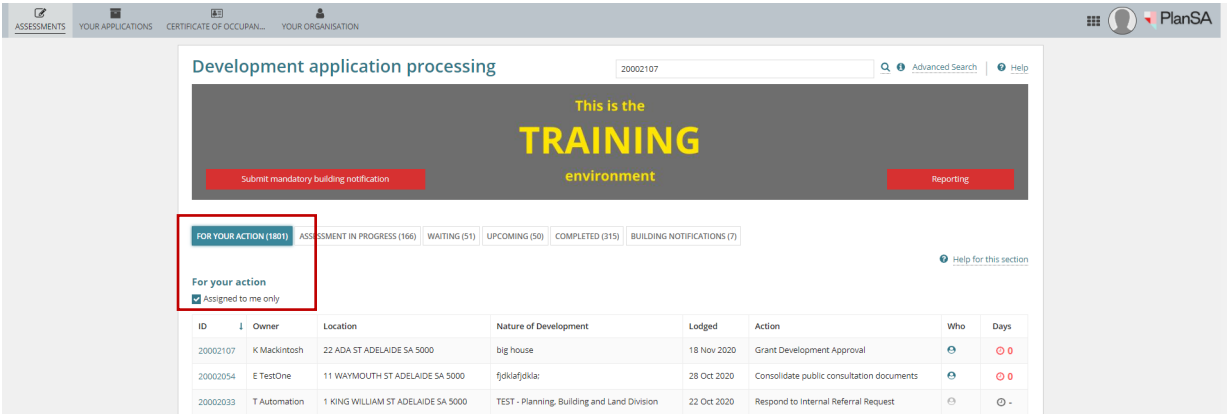
Method 1

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.



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.

ASSESSMENTSYOUR APPLICATIONSCERTIFICATE OF OCCUPANCYYOUR ORGANISATION

PlanSA

Development application processing

Search

Advanced SearchHelp

This is the

TRAINING

environment

Submit mandatory building notification

Reporting

FOR YOUR ACTION (1801)ASSESSMENT IN PROGRESS (166)WAITING (51)UPCOMING (50)COMPLETED (315)BUILDING NOTIFICATIONS (7)

1 results for: "20002107"

☐ Assigned to me only

ID	Owner	Location	Nature of Development	Relevant Authority	Lodged	Status	Days
20002107	K Mackintosh	22 ADA ST ADELAIDE SA 5000	big house	City of Adelaide	18 Nov 2020	Assessment in progress	0

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

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

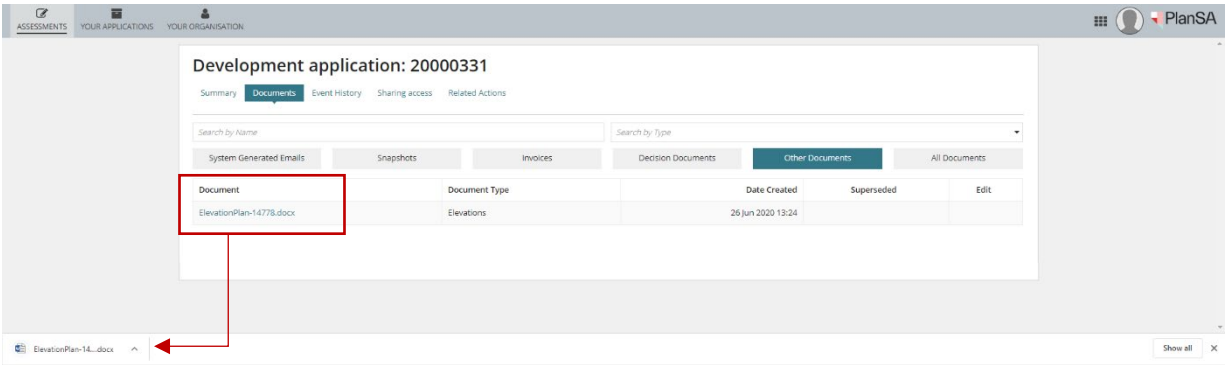
Assessment status

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	
Planning Consent	State Commission Assessment Panel	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	

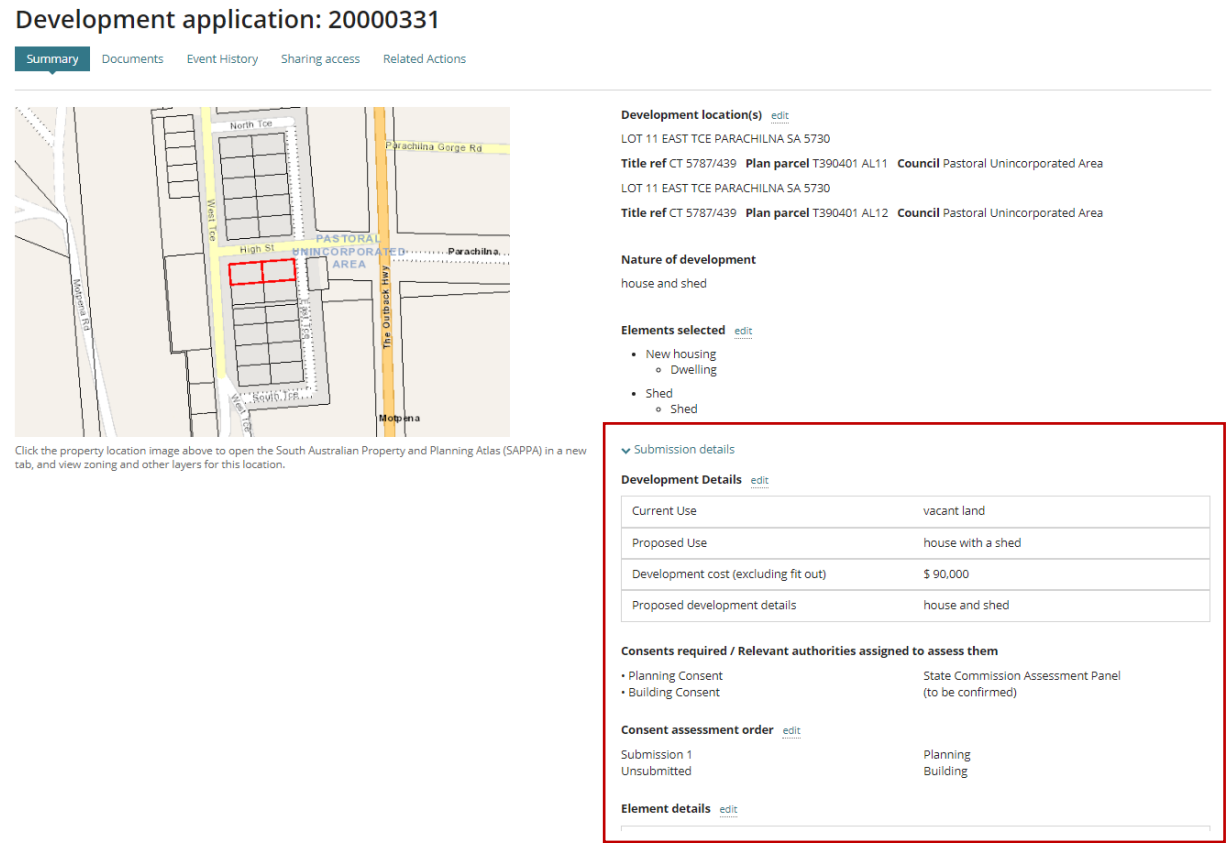
> View team workload

SAVE USER ALLOCATION

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.



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



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

- Development Details
- Element Details


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	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

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

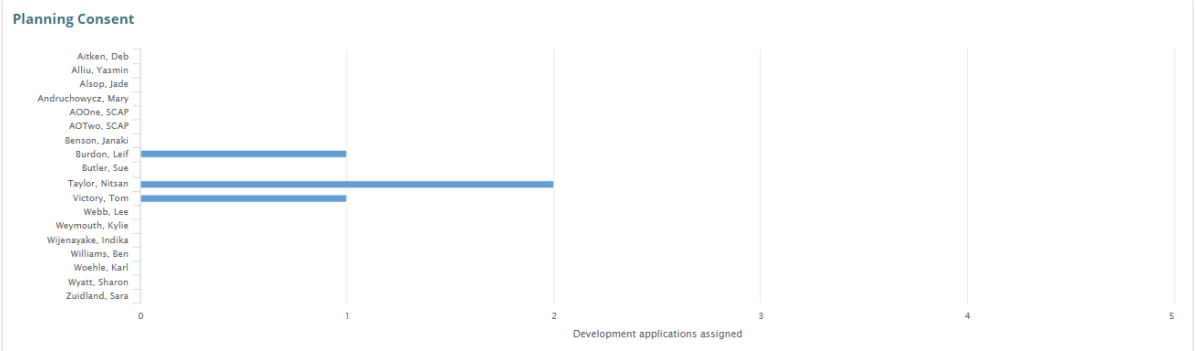
SAVE USER ALLOCATION

Back to all users

Development Applications assigned to Burdon, Leif

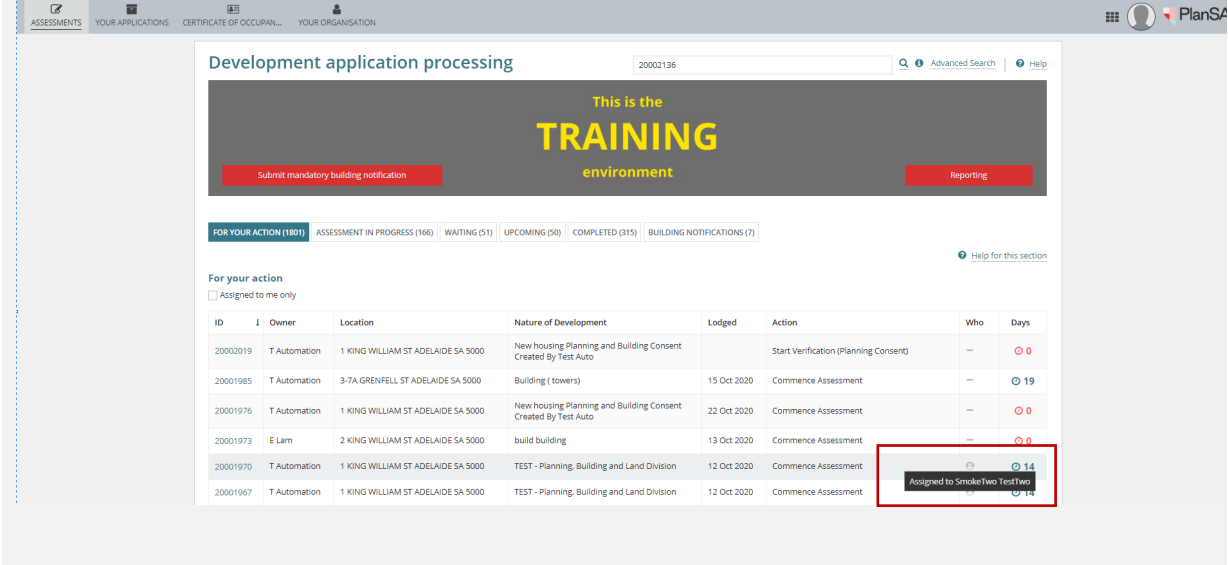
ID	Owner	Location	Nature of Development	Lodged
20000231	J COOL	LOT 200 RAILWAY TCE S MARREE SA 5733	Increase accommodation by 5 units - solar panels - shop - forgot something	15 Jun 2020

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

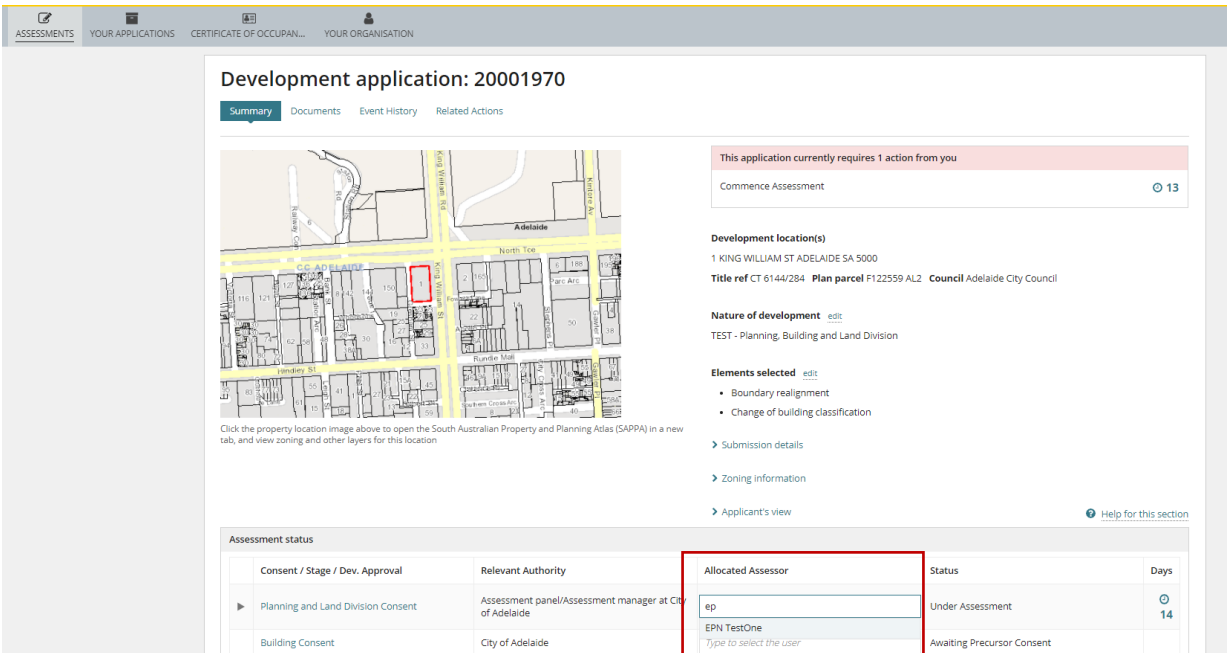


Allocating a Team Member

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.



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.



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 [How to – Update access to PlanSA-DAP for a user | PlanSA](#) 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	Days
▶ Planning and Land Division Consent	Assessment panel/Assessment manager at City of Adelaide	EPN TestOne ✕	Under Assessment	🕒 14
Building Consent	City of Adelaide	Type to select the user	Awaiting Precursor Consent	
Development Approval for: Planning and Land Division Consent Building Consent	City of Adelaide	No assessor assigned Edit	Awaiting Precursor Consent	

> [View team workload](#) [Help for this section](#) [SAVE USER ALLOCATION](#)

✓ Allocation Saved Successfully

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

ASSESSMENTS
YOUR APPLICATIONS
CERTIFICATE OF OCCUPAN...
YOUR ORGANISATION

PlanSA

Development application processing
Search
Advanced Search
Help

This is the
TRAINING
environment
Submit mandatory building notification
Reporting

FOR YOUR ACTION (1801)
ASSESSMENT IN PROGRESS (166)
WAITING (51)
UPCOMING (50)
COMPLETED (315)
BUILDING NOTIFICATIONS (7)

For your action
Assigned to me only

ID	Owner	Location	Nature of Development	Lodged	Action	Who	Days
20002107	K Mackintosh	22 ADA ST ADELAIDE SA 5000	big house	18 Nov 2020	Grant Development Approval	👤	🕒 0
20002054	E TestOne	11 WAYMOUTH ST ADELAIDE SA 5000	fjdakfdkja:	28 Oct 2020	Consolidate public consultation documents	👤	🕒 0
20002033	T Automation	1 KING WILLIAM ST ADELAIDE SA 5000	TEST - Planning, Building and Land Division	22 Oct 2020	Respond to Internal Referral Request	👤	🕒 -
20001970	T Automation	1 KING WILLIAM ST ADELAIDE SA 5000	TEST - Planning, Building and Land Division	12 Oct 2020	Commence Assessment	👤	🕒 13
20001558	E TestOne	1 KING WILLIAM ST ADELAIDE SA 5000	new dev	18 Aug 2020	Consolidate public consultation documents	👤	🕒 0

Received Consent for Application Allocation

On allocation of a development application a notification email 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.

2. Reallocation of Work

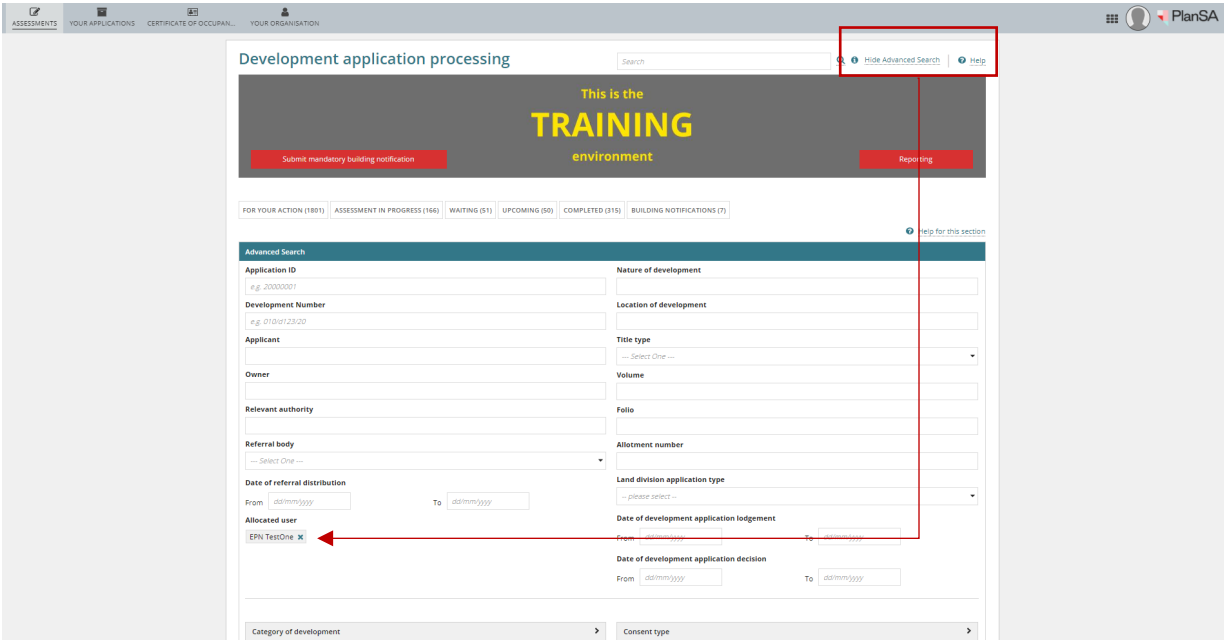
Overview

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

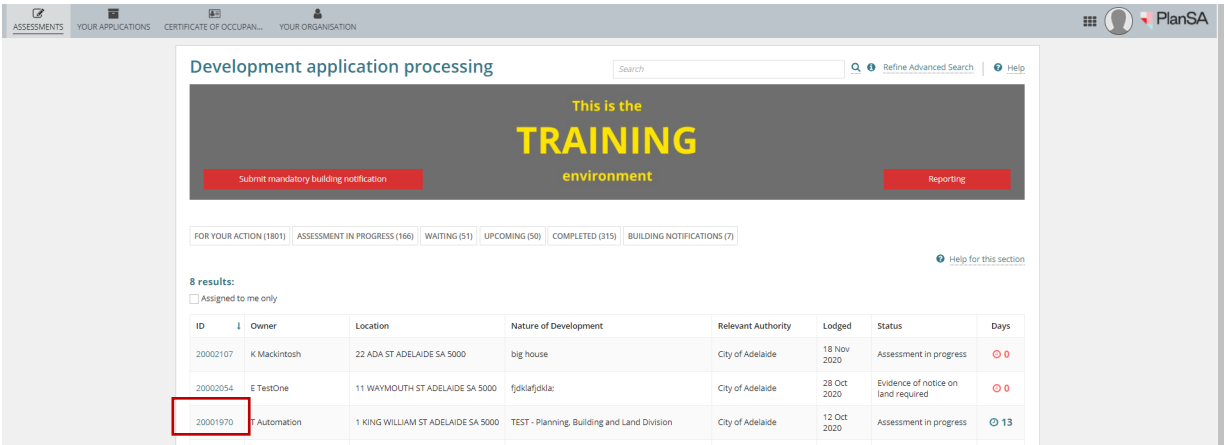
Deleting and Reallocating a Team Member

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.



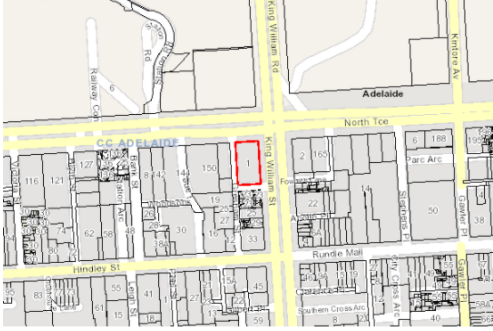
The search will return all applications allocated to the team member, then open the application being reallocated.



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

Development application: 20001970

SummaryDocumentsEvent HistoryRelated 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

This application currently requires 1 action from you

Commence Assessment13

Development location(s)

1 KING WILLIAM ST ADELAIDE SA 5000

Title ref

CT 6144/284

Plan parcel

F122559 AL2

Council

Adelaide City Council

Nature of development

edit

TEST - Planning, Building and Land Division

Elements selected

edit

Boundary realignment

Change of building classification

Submission details

Zoning information

Applicant's view

Help for this section

Assessment status

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	Days
▶ Planning and Land Division Consent	Assessment panel/Assessment manager at City of Adelaide	EPN TestOne x	Under Assessment	13
Building Consent	City of Adelaide	Type to select the user	Awaiting Precursor Consent	
Development Approval for: Planning and Land Division Consent Building Consent	City of Adelaide	No assessor assigned Edit	Awaiting Precursor Consent	

> View team workload

Help for this section

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	Days
▶ Planning and Land Division Consent	Assessment panel/Assessment manager at City of Adelaide	AdelaideCity AO x	Under Assessment	13
Building Consent	City of Adelaide	Type to select the user	Awaiting Precursor Consent	
Development Approval for: Planning and Land Division Consent Building Consent	City of Adelaide	No assessor assigned Edit	Awaiting Precursor Consent	

> View team workload

Help for this section

SAVE USER ALLOCATION

Allocation Saved Successfully

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

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**.



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	Days
▶ Planning and Land Division Consent	Assessment panel/Assessment manager at City of Adelaide	AdelaideCity AO x	Under Assessment	13
Building Consent	City of Adelaide	Type to select the user	Awaiting Precursor Consent	
Development Approval for: Planning and Land Division Consent Building Consent	City of Adelaide	No assessor assigned Edit	Awaiting Precursor Consent	

[View team workload](#) [Help for this section](#) [SAVE USER ALLOCATION](#)

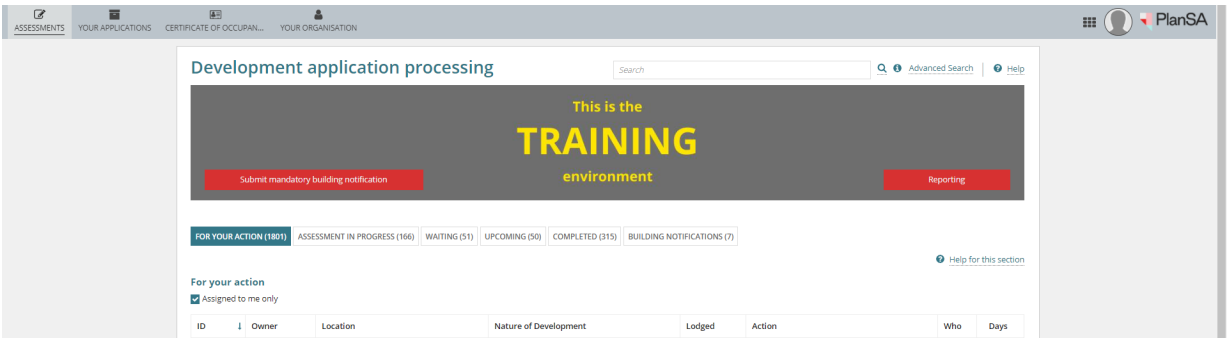
Start to type the name of the team member in the **Allocated Assessor** field and from the list of matching names, select the team member, then **Save User Allocation** to perform the allocation.

Assessment status				
Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	Days
▶ Planning and Land Division Consent	Assessment panel/Assessment manager at City of Adelaide	EPN TestOne x	Under Assessment	13
Building Consent	City of Adelaide	Type to select the user	Awaiting Precursor Consent	
Development Approval for: Planning and Land Division Consent Building Consent	City of Adelaide	No assessor assigned Edit	Awaiting Precursor Consent	

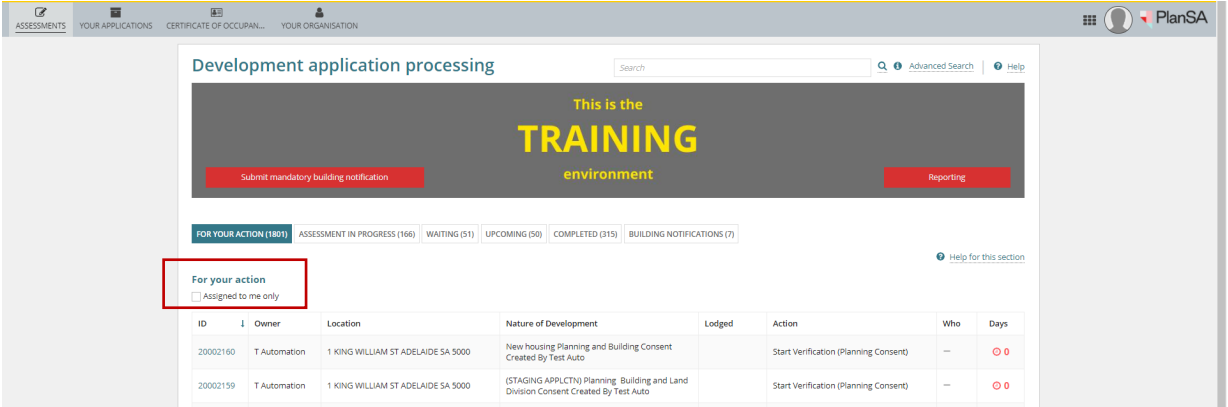
[View team workload](#) [Help for this section](#) [SAVE USER ALLOCATION](#)

✓ 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.



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



Received Consent for Application Allocation

On reallocation of a development application a notification email 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
Department for Housing
and Urban Development