

Pre-Assessment of new Concurrence and Referrals

and Assignment to Agency Responsible Officer

May 2019

Pre-assessment and Assignment

When Council needs to include one or more Agencies in the assessment of a development application, they add the requisite clauses to the Concurrence and Referral (CNR) within the ePlanning Portal and select the relevant agency/ies. This sends the CNR to the agency/ies into the Unassigned workbasket with a status of *Review Request*.

Agencies have the opportunity to perform a “pre-assessment” of the request, ensuring it is correct and relevant, and allowing for any fees to be paid, prior to proceeding with full assessment of the application. In the event things are not right, the request can be rejected.



To view all Concurrence and Referral requests referred to your agency, you will need to be logged into the Concurrence and Referral service via the ePlanning Portal. The link can be found here:

<https://apps.planningportal.nsw.gov.au/prweb/IAC>. If you do not have an ePlanning Portal account, see the *How to register for a planning portal account* guide.

Step 1: Select the relevant concurrence and referral case

You can view unassigned and assigned Concurrence and Referral requests to the right of your dashboard. Use the **Unassigned Tasks** workbasket to pick up new requests.

Regarding incoming requests

Your agency generic email address will be automatically notified of referred Concurrence and Referral requests from Council.

The system sends Concurrence and Referral cases to only one email address. If your Agency has multiple regional offices, then you need to appoint one generic email address for all concurrence and referral case (for all regional offices) to be sent to for the organisation. The person monitoring the appointed email address will need to refer to the Local Government Area (LGA) defined in the body of the email received to determine which regional agency email address to forward the Concurrence and Referral to.

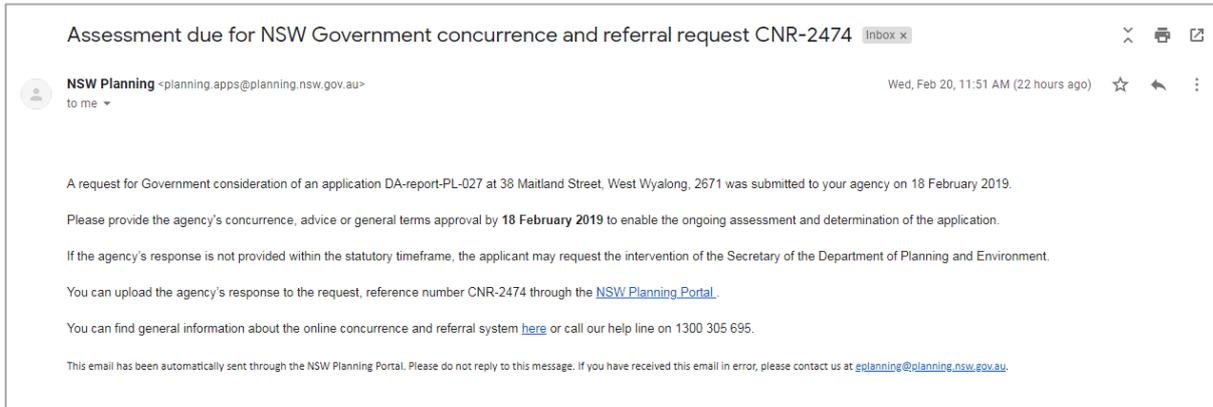
Unassigned Tasks	
Concurrences and Referrals	71

Assigned Tasks	
cnr agency	4
CNRDPEAgency	21
CNR DPE Agency R2	61
dpeagency user1	1
DPE User1	25
Gautam Gantha	0
Janani DPEUser	0
M K DPE Agency User	1
Rebecca Carlson	1
RebeccaDPEAgency	2
See all team members (11)	

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Once the Agency receives the forwarded email, the user can log into the Concurrence and Referral system to access the case via the "Unassigned Tasks" basket and proceed with pre-assessment and assignment of the job.

Applicants will also be notified when a Concurrence and Referral Case has been referred to the Agency (the point of notification occurs at the same time the generic Agency email gets notified of incoming concurrences and referrals from Council).

- Click on **Concurrence and Referrals** underneath **Unassigned Tasks** to view all cases which are yet to be pre-assessed and assigned. The status of these cases will be "Review request".

Performance	Days Lapsed	Reference Number	Site Address	Status	Application Type
●		A-1357	12 Good Street, Westmead, 2145	Review request	Concurrence and Referral
		A-1796	20 Speers Street, Speers Point, 2284	Review request	Concurrence and Referral
		A-1114	105 Belmont Road, Mosman, 2088	Review request	Concurrence and Referral
		A-1863	41 Carina Road, Oyster Bay, 2225	Review request	Concurrence and Referral

Unassigned Tasks

- Concurrences and Referrals 535

Assigned Tasks

- CD Christine DPEAgency 55
- CD Christine dpeagency1 0
- CA cnr agency 3
- CD CNR DPE Agency 1

- Select the case you wish to pre-assess via the blue hyperlink. You will then be directed to the **Pre-assessment Review and Initial assignment** page.

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Step 2a: Accept the case within the Preliminary Assessment period and assign agency officer

Agencies will be required to determine whether clause assessment is accepted or rejected. You will have two working days to pre-assess and assign a concurrence case to a responsible agency offer.

The **Due date** and **Time left** countdown timer is displayed in the right corner (see screenshot below).

Note: When this time expires, the concurrence and referral case is automatically accepted on an agency's behalf. In this instance, the concurrence and referral case will remain in "unassigned tasks" and the status will change to either: "Awaiting Payment" (if payment by the applicant is required) OR "Under Assessment". Agency will still be required to assign the case to a responsible agency officer to progress the case to "assessment" stage.

Clause	Clause Description	Type
Other	test	Referral

Is agency assessment required? *

Accept

Reject

Buttons: Cancel, Save, Submit

Note: When a concurrence and referral case is "Accepted" (either manually, or automatically at the end of the pre-assessment period), the applicant is notified and prompted to pay any agency fees.

Your clock does not commence until the preliminary assessment period ends or you manually accept the case.

- Review the case details and related documents to determine whether you wish to "accept" a concurrence and referral via the tabs shown below:

Document name	Document type	Size	Organisation	Uploaded by	Upload date
MANAGE.png	Site plans	135 KB	SUTHERLAND SHIRE COUNCIL	Rebecca Carlsen	27/02/2019 10:07 AM

Note: The online concurrence and referral system will keep all uploaded documents linked to a concurrence and referral case. However, it is advised you continue to save the documents into your organisation's local data management system and continue with your current data management procedures. This is to capture all associated offline conversations and

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documentation as you do today. The concurrence and referral system should only be used to facilitate key formalised documentation uploads that the applicant will also be able to view.

- b. Once you have reviewed the concurrence and referral case, click **Accept** or **Accept Individually** per clause as required. Where the decision remains the same for multiple clauses that have come through for assessment, you can select **Accept All**.

Clause	Clause Description	Type
Other	test	Referral

Is agency assessment required? *****

Accept

Reject

- c. Assign an agency officer to the case via the “Assign case to” drop down menu provided.

Is agency assessment required? *****

Accept

Reject

Assign case to: *****

agency officer

Christine DPEAgency

Chrhaline dpeagency1

cnr agency

CNRDPEAgency

dpeagency user1

DPE User1

Gautam Gandha

Mohani Kona

Rebecca Carlsen

Cancel

Save

Submit

Note: To add a name to the dropdown list, contact your Agency Administration.

Where there are two or more users with the same name you can view their phone number and email details to distinguish between them.

- d. Click **Submit** to complete your pre-assessment and assignment. You will be directed to the **Assessment** page.

Cancel

Save

Submit

Note: You can cancel your pre-assessment and assignment by clicking “Cancel”. You can also press “Save” to draft your pre-assessment and assignment and resume at a later stage. You or another user can log into to complete pre-assessment submission.

Pre-assessment must be completed within the two working days “pre-assessment” period prior to assigning the assessment request.

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Step 2b: Reject the case within the Preliminary Assessment period

Agencies can choose to reject an application prior to performing any assessment activities. You will have two working days to pre-assess and reject, else the request will be automatically accepted.

The **Due date** and **Time left** countdown timer is displayed in the right corner (see screenshot below).

Clause	Clause Description	Type
Other	test	Referral

Is agency assessment required? *

Accept

Reject

Cancel Save Submit

Note: When a concurrence and referral case is “Accepted” (either manually, or automatically at the end of the pre-assessment period), the applicant is notified and prompted to pay any agency fees.

Your clock does not commence until the preliminary assessment period ends or you manually accept the case.

- Review the case details and related documents to determine whether you wish to reject a concurrence and referral via the tabs shown below:

Document name	Document type	Size	Organisation	Uploaded by	Upload date
MANAGE.png	Site plans	135 KB	SUTHERLAND SHIRE COUNCIL	Rebecca Carlsen	27/02/2019 10:07 AM

- Once you have reviewed the concurrence and referral case, click “Reject”, “Reject Individually” or “Reject All” as required.

Is agency assessment required? *

Accept

Reject

Please provide reason *

Please provide a reason an agency assessment is not required. Note: This information will be viewed by the those outside your organisation.

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- c. You will be required to provide a reason why agency assessment is not required. This is a free text field for your comments.



Is agency assessment required? *

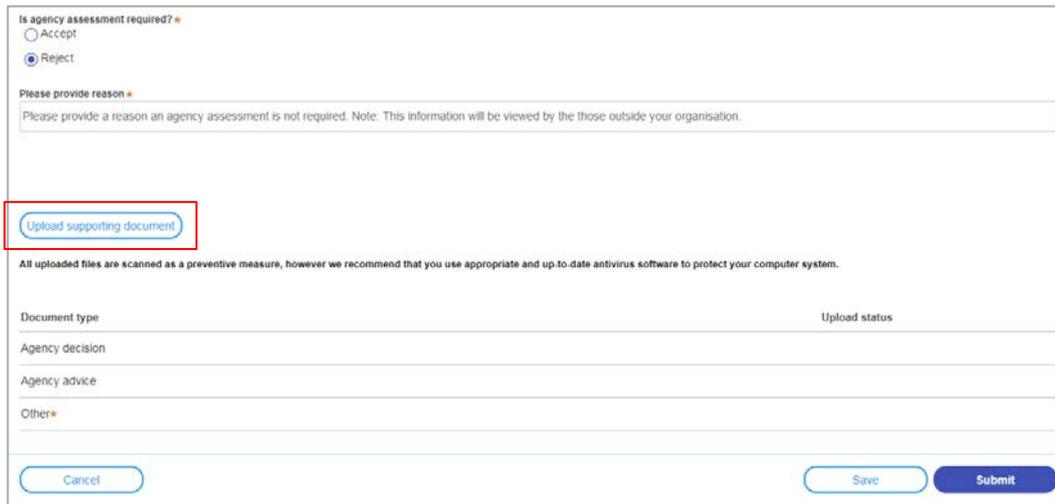
Accept

Reject

Please provide reason *

Please provide a reason an agency assessment is not required. Note: This information will be viewed by the those outside your organisation.

- d. Upload supporting documents and categorise each as either “Agency decision” or “Agency advice”. See the *HowTo Upload documents* guide for detailed steps.



Is agency assessment required? *

Accept

Reject

Please provide reason *

Please provide a reason an agency assessment is not required. Note: This information will be viewed by the those outside your organisation.

Upload supporting document

All uploaded files are scanned as a preventive measure, however we recommend that you use appropriate and up-to-date antivirus software to protect your computer system.

Document type	Upload status
Agency decision	
Agency advice	
Other*	

Cancel Save Submit

- e. Click **Submit** to complete the rejection.



Cancel Save Submit

Next Steps

If accepted manually, the Concurrence and Referral request will be automatically referred to the Agency Responsible Officer’s work queue to undergo assessment. At this stage, the Agency Responsible Officer will review case details and documents uploaded to advise whether additional information is required or whether the information submitted is sufficient to undergo clause assessment. The Applicant is also notified and prompted to pay any agency fees.

If Auto-accepted after the preliminary assessment period expires, the concurrence and referral case is automatically accepted on an agency’s behalf. The concurrence and referral case will remain in “unassigned tasks” and the status will change to either: “Awaiting Payment” (if payment by the applicant is required) OR “Under Assessment”. Agency will still be

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required to assign the case to a responsible agency officer to progress the case to “assessment” stage. The Applicant is also notified and prompted to pay any agency fees.

Applicants, Councils and Agencies alike will be able to track the progress of the Concurrence and Referral request via respective dashboards at any stage.

If you need more information:

If you need assistance, please contact eplanning@planning.nsw.gov.au