



Water Servicing Coordinator

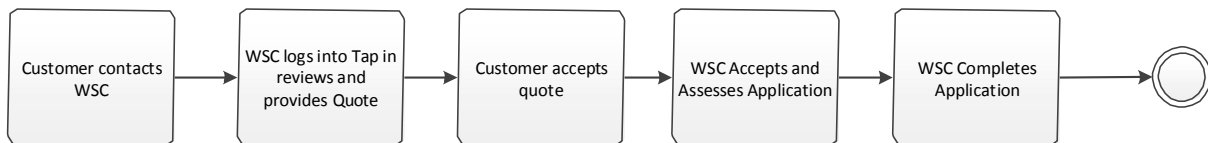
Work Instructions - Manage building plans

Sydney Water Tap in™

All building plan applications submitted through Sydney Water Tap in™ that have the potential to impact on a Sydney Water asset will be referred for further assessment.

Customers with referred applications must then engage a Water Servicing Coordinator (WSC) to complete their application.

This work instruction describes the processing of referred building plan applications through the Sydney Water Tap in™ WSC Dashboard.



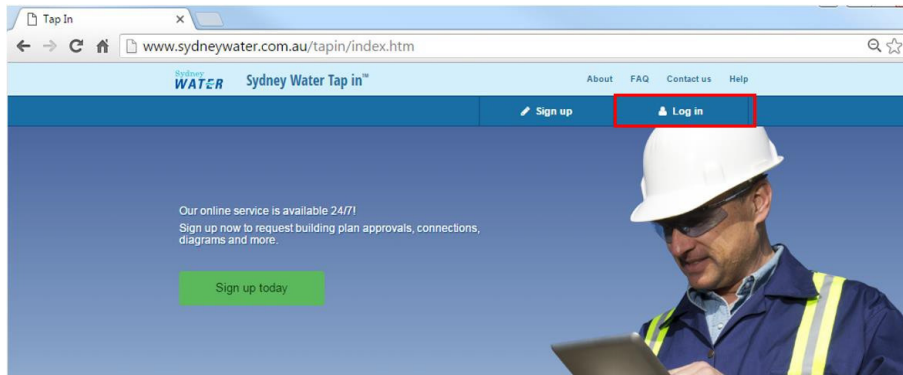
The WSC Dashboard is linked to your Sydney Water Tap in™ user registration and your 'Authorised Agent Company'. This gives all employees visibility of all accepted applications.

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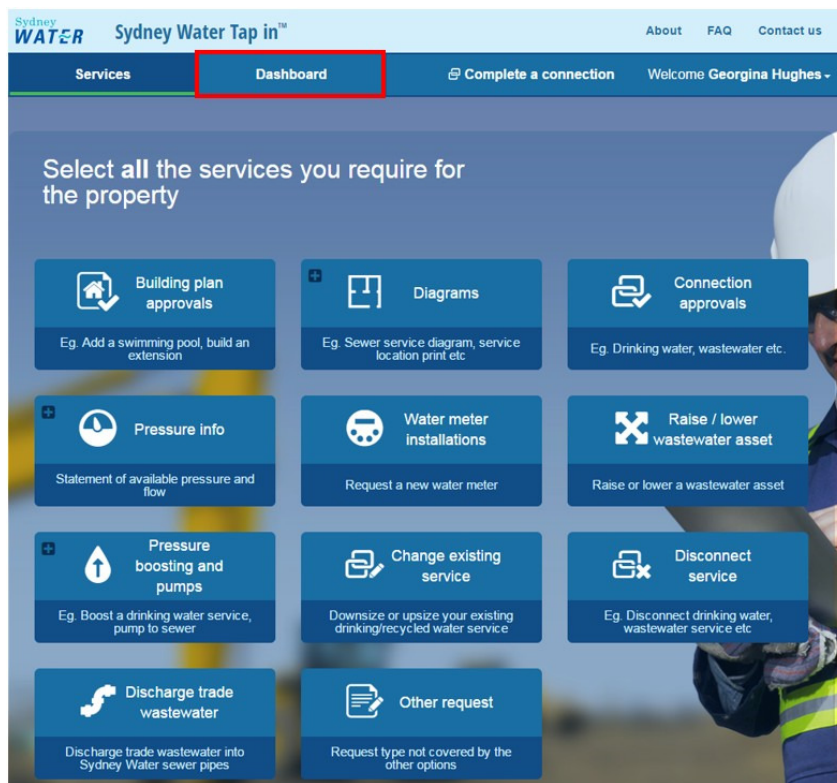
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Log into the WSC Dashboard

1. Log into Sydney Water Tap in™ at www.sydneywater.com.au/tapin/



2. Select the Dashboard button from the menu.



Review an application

My Dashboard has two views:

- **Lodged and draft applications** – Lists submitted or partial applications you've created.
- **Referred applications** – is the default view and lists referred applications that have been accepted by any WSC associated with the same WSC Company. This view remains empty until a referred application has been accepted.



The **Find application** search field is used to search for applications that have already been accepted.

1. To search for or to view a new building plan application referral, select the **Accept new referred application** button.

My Dashboard

View: Referred applications

☐ Hide completed applications

Accept new referred application

Show 10 entries

Find application: Search for address or client or reference no

Submitted	Property address	Client	
May 18 2016	6 Bringelly PI, Bungarribee 2767	Banu, Nargis	View completed application
May 18 2016	6 Bringelly PI, Bungarribee 2767	Banu, Nargis	View completed application

2. The **Application details** window will be displayed.
3. Enter the **Reference number** provided by the customer and click **Get application**.



The Sydney Water Tap in™ **Reference number** can be found in the Customer's Building Plan Approval referral letter.

Accept new referred application

Please review the following details before accepting this application:

1 Please enter the reference number given to you by the client

REF-000465588

Get application

6 Bringelly PI, Bungarribee 2767

Plan number: 1171684, Lot number: 4105

4. The **Accept new referred application** window will display the application details.



New (unaccepted) applications are displayed with a status of Not Yet Assessed. If an application has already been accepted the application status will be either started, approved or rejected.

Accept new referred application

Please review the following details before accepting this application:

1 Please enter the reference number given to you by the client

REF-000101115

Get application

Application summary

Status: Not Yet Assessed
Client: Georgina Hughes

5. To review the application information:

- In the **Structure summary** section, select **View** to display the structure placement.
- Click on the attachment link in the **Attached documents** to view the document/s attached to the application.



View the application from the **Accept new referred application** screen without accepting the application to help to determine a quote for a customer.

2 Structure details

Structure summary

Structure 1
Granny flat
4.0 x 4.0 x 1.0 m
This structure did not pass approval criteria

View

3 Attached documents

Attachment.docx

Accept a new application

Following a review and quote of the application, the customer agrees to engage the WSC to act on their behalf. Once agreement has been reached the application can be accepted in Sydney Water Tap in™.

 Accepting the application prevents it from being accepted by another WSC and allows the assessment to be processed in Sydney Water Tap in™.

To accept a new application:

1. Search for and open the application.
2. In the **Accept new referred application** screen, click on the *'I confirm that all of the above details are correct and I have permission from the owner to proceed'* checkbox.
3. Select the **Accept Application** button.

2 Structure details

Structure summary

Structure 1
Granny flat
4.0 x 4.0 x 1.0 m
This structure did not pass approval criteria

View

3 Attached documents

Attachment.docx

☒ I confirm that all of the above details are correct and I have permission from the owner to proceed

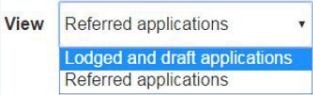
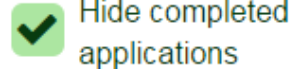
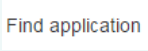
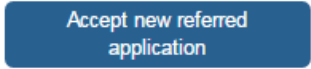
Close **Accept application**

4. Select the **Close** button to return to the **Referred applications** view.

 Applications that have been accepted by any WSC associated with your WSC Company in Sydney Water Tap in™, are listed in the **Referred applications** view.

View accepted applications

The following options are available in the **Referred applications** view:

Display Option	Description
	Lodged and draft applications – Lists submitted or partial applications you’ve created. Referred applications – is the default view, and lists referred applications that have been accepted by any WSC associated with the same WSC Company. This view remains empty until a referred application has been accepted.
	Choose the number of entries displayed per page by clicking on the arrow and selecting an option from the drop down menu.
	Sort the list of applications by submitted date by clicking on the arrow to the right.
	Sort the list of applications by suburb by clicking on the arrow to the right.
	Sort the list of applications by the name of the person who submitted the application by clicking on the arrow to the right.
	To hide/unhide all completed applications from the Referred applications view click on the checkbox to the left.
	Search for an accepted application in the Find application field by entering one of the following criteria: - Property address - Customer name (surname, first name or both) - The 9 digit reference number on the referral letter, eg: REF-123456789
	Searching for new referred applications using the reference number provided by the Customer.

Assess an accepted application

1. In the **Referred application** view, commence an assessment by clicking on the **Start assessment** button.



If you've already started an assessment and are returning to complete an assessment click on the **Continue Assessment** button.

The screenshot shows a 'My Dashboard' interface. At the top, there's a 'View' dropdown set to 'Referred applications' and a 'Hide completed applications' checkbox. A blue button 'Accept new referred application' is on the right. Below, a 'Show' dropdown is set to '10' entries. A search bar labeled 'Find application' contains the text 'Search for address or client or reference no'. A table lists applications with columns: Submitted, Property address, and Client. One entry is visible: 'May 27 2016', '6 Bringelly Pl, Bungarribee 2767', and 'Hughes, Georgina'. A red-bordered 'Start assessment' button is next to this entry.

2. The **Application assessment** view is displayed.
3. To review the application information select **Review** to display the structure placement in the **Structure summary** section.

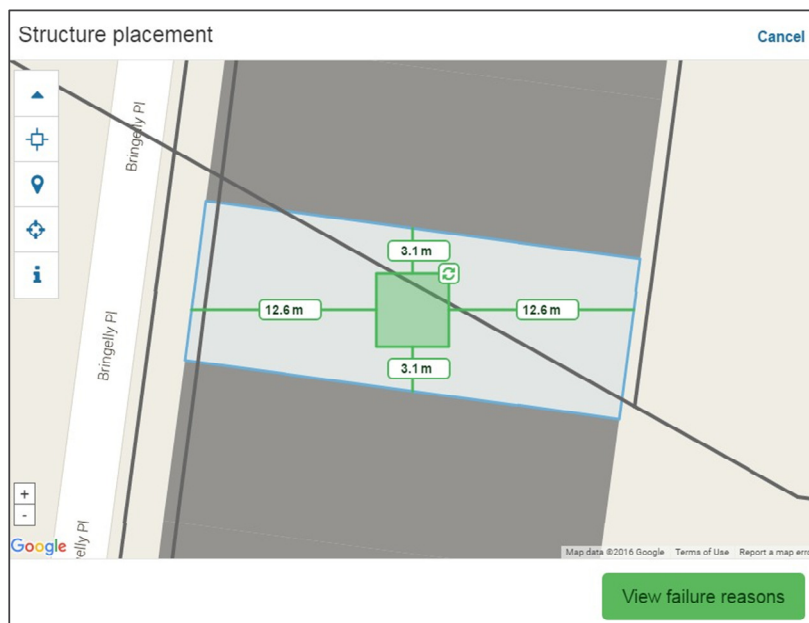
The screenshot shows the 'Approval conditions' section. It starts with a heading '1 Approval conditions' and a sub-heading 'Please provide the approval conditions for each structure which did not pass approval criteria'. Below this is a 'Structure summary' box. Inside, 'Structure 1' is listed with details: 'Granny flat', '5 x 5 x 1 m', and 'This structure did not pass approval criteria'. A 'Remove x' link is to the right. A red-bordered 'Review' button is highlighted with a red box. At the bottom of the box is an 'Add a structure' link.

4. The Structure placement window will display the placement of the structure and the location of Sydney Water assets.



If the location of the plotted structure doesn't match the site plan or is incorrect, edit the structure location before adding the approval conditions.

5. To continue click on the **View failure reasons** button. The reason for the failure will be displayed.



6. The reasons for the referral are displayed in the **Failure reasons** window.
7. To add approval condition/s, click on the **Provide approval conditions** button.



8. The **Provide approval conditions** window is displayed.
9. Enter the minimum pipe clearance required and select all applicable approval conditions checkboxes relevant to approval of the application (refer the BPA Procedure document for approval conditions guidelines).
10. Click the **Done** button to return to the **Application assessment** window.

Provide approval conditions Cancel

Minimum pipe clearance

Horizontal (meters) Vertical (meters)

.9 1

☒ Piers required

☒ Concrete encasement required

☐ Junction relocation required

☐ Indemnity required

Back Done

11. If the customer has forgotten to include all new structures or if a structure needs to be added or removed:
 - Add a new structure by clicking on the **Add a structure** link and plotting the new structure according to the customer's plans.
 - Remove a structure by clicking on the **Remove** link next to the structure to be removed.

Structure summary

Structure 1 Remove x

Granny flat

5 x 5 x 1 m

This structure did not pass approval criteria

Review

Add a structure

12. Scroll down to the **Attached documents** section.
13. Click on the **Attachment link** (green tick is displayed to the right) to view attached plans or other relevant documents attached to the application.
14. If any new structures have been added or removed or if plans have been changed attach additional supporting documents or remove outdated attachments:
 - Add a new attachment by clicking on the **Add file** button.
 - Remove an attachment by clicking on the **Remove** link next to the attachment to be removed.

Attached documents

Add a file +

Maximum of 5 files.
Size limit: 10 mb

PDF

JPG

DOC

Attachment.docx ✓

Remove ✕

15. Scroll down to the **Comments** section and enter any comments relevant to the approval or the modifications of the structure or plans before approving the application.

Comments

Please use this to provide additional approval conditions

Example: A pool structure was omitted from the original application.
Structure was also plotted in wrong location.
Amended application to reflect changes.

16. If required select a status from the **Internal use** dropdown menu. This will be displayed on the Referred applications screen.

17. If required enter notes in the **Notes** field.



Internal use Status and Notes can't be edited or removed after the application has been approved.

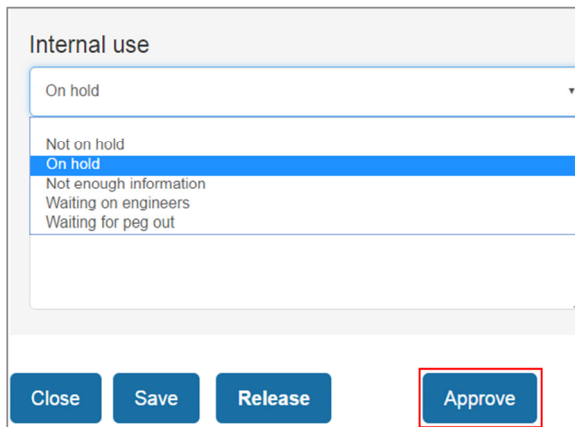


If the application is partially reviewed and needs to be completed at a later time, click on the **Save** button to save progress to date.

The screenshot shows a form with two main sections: 'Internal use' and 'Notes'. The 'Internal use' section has a dropdown menu currently showing 'On hold'. The 'Notes' section is a large text area with the placeholder text 'Notes about assessment'. Below the form are four buttons: 'Close', 'Save', 'Release', and 'Approve'. The 'Save' button is highlighted with a red box.

Approve application

1. Once the application assessment is complete and you're ready to approve the application, click on the **Approve** button.



The screenshot shows a form titled 'Internal use' with a dropdown menu. The dropdown is open, showing options: 'On hold' (selected), 'Not on hold', 'Not enough information', 'Waiting on engineers', and 'Waiting for peg out'. Below the dropdown are four buttons: 'Close', 'Save', 'Release', and 'Approve'. The 'Approve' button is highlighted with a red border.

2. The **Application assessment** window is displayed with a message saying, the “**Application has been successfully approved**”.



Once the application has been approved the placement of the structure, approval conditions, attachment documents or the Internal use comments or status can't be modified.



The screenshot shows the 'Application assessment' window. A green message box at the top says '✓ Application has been successfully approved.' Below this, the application number is 18101 and the client is Georgina Hughes. The reference number is REF-000561565. The window also shows the address '6 Bringelly Pl, Bungarribee 2767', the plan number '1171684', and the lot number '4105'. A section titled '1 Approval conditions' is visible at the bottom, with a note to provide approval conditions for structures that did not pass approval criteria.

3. To return to the **My Dashboard** screen click the **Save** button, and then the **Close** button.
4. The approved application will be displayed in the **WSC Dashboard** with a status of **Complete Application**.



Completion package documents can be attached after the application has been approved.



It's ideal to attach a copy of the stamped building plans in the **Completion package section** once you've approved the application.

Complete an application

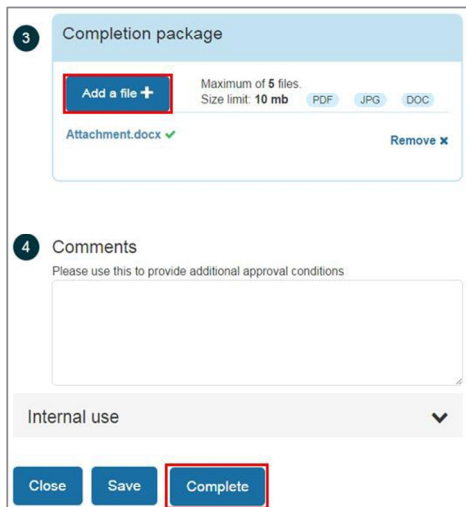
It's mandatory to add the Completion package (PCP attachments). Please refer to the Building Plan approval procedure for details.

 The Project Completion Certification can be used as a checklist for other relevant documentation that must be attached (refer to Appendix 1). In all cases completion packages must include a copy of the Project Completion Certification, and the stamped plans.

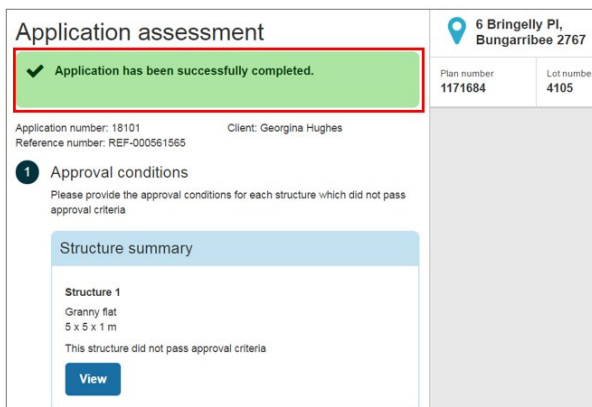
1. To attach a completion package documents to a completed application, click on the **Add file** button in the **Completion package** section.

 If you've attached the wrong document you can remove an attachment by clicking on the **Remove** link next to the attachment and reattach a new document.

2. To complete the assessment click on the **Complete** button and then the **Close** button.



3. The **Application assessment** window will be displayed with a message saying, the **“Application has been successfully completed”**.

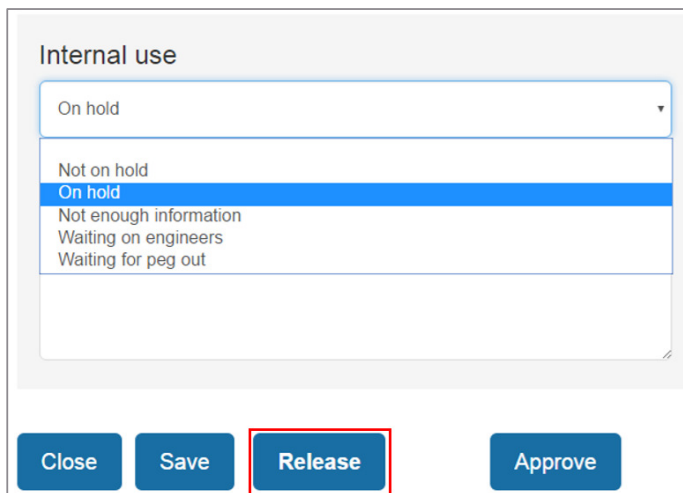


Release an accepted application

If you and your client decide to mutually terminate your arrangement, you can release their application. Once an application has been released it can be accepted by another WSC.

You must inform your customer if you are going to release their application.

1. To release an accepted application, click on **Release** button at the bottom of the **Application assessment** screen.



Internal use

On hold ▼

- Not on hold
- On hold
- Not enough information
- Waiting on engineers
- Waiting for peg out

Close Save **Release** Approve

Trouble Shooting and Frequently Asked Questions

Issue	Fix
<i>I can login but I can't see the new WSC Dashboard</i>	You need to be given a WSC profile by Sydney Water before you can access the new WSC functionality. Access for WSCs with existing Sydney Water Tap in™ logins should have already been set up. If we've missed setting you up with the WSC profile, please call Sydney Water on 13000 TAPIN to request access. New WSC will not be set up automatically and will need to contact Sydney Water and request the WSC profile to be added to their login.
<i>I have the WSC profile but I can't see applications accepted by other WSC in my company</i>	If your profile has not been linked to your Company you won't be able to see applications accepted by other WSCs at your company. Please call Sydney Water on 13000 TAPIN to request your profile is linked to your company.
<i>I can't see a referred application in My Dashboard screen</i>	Applications may not be visible due to the following reasons: • Application is already completed and the Hide completed applications checkbox is ticked. To see all application remove the tick from the Hide completed applications checkbox and search for the application using the Find application search field. • The application was viewed but never accepted by WSC. Make sure the application has been accepted. • The Lodged and draft applications option is selected in the View dropdown. Select Referred applications from the View dropdown to display all accepted referred applications.
<i>The 'Accept a new referred application' function doesn't display the application I'm looking for</i>	• Applications submitted prior to 20th June 2016 will continue to be managed via the old blueform process. • Check the reference number you've entered is correct. • You may be searching for an application that is not assigned to you yet. Check that you're in the Accept new referred application search screen.
<i>I accidentally clicked the Approve button</i>	If you've accidentally approved an application, the application will have be re-submitted at your expense. There is no function to 'un-approve' an incorrectly approved application. The WSC must to notify Sydney Water about the previous application.

Appendix 1 – Project Completion Certificate

PROJECT COMPLETION CERTIFICATE - BPA - SYDNEY WATER TAP IN		
Dolfin No: NOT REQUIRED	Project location: 	
Sydney Water Tap in Ref no: 	Building/structure description: 	
DOCUMENTS	Yes	N/A
Completed Building Plan Approved – Subject to Requirements form is attached	☐	☐
Completed Building Plan Approval Requirements form (Blue Form) is attached	☐	☐
Approved Building Plan (scanned site plan) is attached	☐	☐
Service Protection Report (peg out) / WAC plan is attached	☐	☐
Approved Engineering Plans (eg scanned footings plans and cross sections) are attached	☐	☐
Minor Works Agreement/s is attached	☐	☐
Indemnity Letter is attached	☐	☐
Restoration Clearance Letter is attached	☐	☐
Letter of Approval (LOA) is attached (out of scope applications only)	☐	☐
Minor Works - Work As Constructed report (including sketch) is attached	☐	☐
Any other required documents are attached (eg requirements from LOA, such as CCTV or geotechnical reports)	☐	☐
COMMENTS: 		
WSC FOUNDATION VALIDATION: (complete where applicable) I certify that the piers / foundations / footings are in accordance with the engineers plans prepared for the construction of the above described structure, that they comply with Sydney Water's Requirements and that I inspected the piers / foundations / footings prior to pouring of concrete.		
 WSC Company Name	 Name of Key Personnel	
 Date	 Signature of Key Personnel	
WSC PROJECT COMPLETION CERTIFICATION: I certify that the building plans have been approved and all appropriate works were constructed and supervised in accordance with Sydney Water Requirements, that all documentation submitted complies with the relevant Provider Instructions, the above documentation is included in the Project Completion Package, and all information above is correct.		
 WSC Company Name	 Name of Key Personnel	
 Date	 Signature of Key Personnel	

Warning - Document current at time of printing or downloading.

Doc. Number: ACDP0264

Doc. Owner: Manager, Urban Growth Property Development

November, 2015

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Change History

Version	Date Revised	Author/s	Approved By	Brief description of change
1	May 2016	Nargis Banu	Alex Meca	New Tap in™
2	June 2016	Nargis Banu	Alex Meca	Revised including comments from Urban Growth team to entire document