

Background

The File Notes document allows you to capture assessment notes, conversations, workings etc. There are no restrictions on viewing and/or adding to the File Notes by other team members who are working on the assessment with the main assessing officer.

Who has access to the file note?

Only the relevant authority who assessed and granted the planning consent. When the relevant authority is the same for both planning consent and development approval, then the file note document is visible to 'all' users within the relevant authority.

Those who cannot see a file note from the Documents store are:

- Applicant
- Application contacts
- Relevant authority is an accredited professional, and
- Referral body.

Can I add a file note once the consent is granted?

No. Once the consent is granted the file note is no longer editable.

Included instructions

- [Generate the File Note](#)
- [Alternate pathway to generate the file notes](#)
- [Add a File Note](#)

Related Instructions

- [Assess an application consent](#)

How to... Generate and edit a file note



Generate the File Note

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1. Click on the **Documents** tab and then **Generate File Notes**.

The screenshot shows the PlanSA interface for a 'Development application 21003080'. The 'Documents' tab is highlighted with a red dashed circle. Below the tabs, there are search filters for 'Document search' and 'Where was the document uploaded?'. The 'Document search' section includes three input fields: 'Search by Name', 'Search by Category', and 'Search by Type'. The 'Where was the document uploaded?' section has three checkboxes: 'Application' (checked), 'Planning Consent' (checked), and 'Building Consent' (unchecked). Below these filters is a table with columns 'Document' and 'Type'.

2. Click on the 3 dots to show and select **Generate File Notes**.

The screenshot shows the PlanSA interface with a dropdown menu open. The 'Generate File Notes' option is highlighted with a red dashed circle. The dropdown menu is located next to the 'GENERATE PANEL ASSESSMENT R...' button. Below the dropdown menu, there are sections for 'Additional document filters' and 'Other'. The 'Additional document filters' section has four checkboxes: 'P&D Code Rules', 'System Generated Emails', 'Snapshots', 'Invoices', and 'Other Documents'. The 'Other' section has one checkbox: 'Superseded'. Below these sections is a table with columns 'Date Created', 'Superseded', 'Visible to Applicant', and 'Edit'.

How to... Generate and edit a file note



Alternate pathway to generate the file notes

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1. Click **Related Actions** within the Planning Consent menu.

Planning Consent for Development Application: 21003080

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

< Development application 21003080

Consent status: Under Assessment

Development location(s)
73 GRENFELL ST ADELAIDE SA 5000
Title ref CT 6128/586 Plan parcel F181777 AL125 Council Adelaide City Council

Zoning information

Zones

- Capital City

3. Click **Generate File Note** option.

Planning Consent for Development Application: 21003080

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

- Upload Documents**
Upload documents associated with consents for the DAP.
- Determine Additional Fees**
Determine if additional fees are required for a consent in the DAP
- Generate Assessment Report**
Generate an assessment report for the DAP
- Generate Panel Assessment Report**
Generate a Panel Assessment Report for the DAP
- Update Appeal Matters**
Add or Update Appeal Matters for the DAP
- Place On Hold**
- Reset Assessment Time-frame as per Reg 35.1**
- Generate File Notes**

4. Click **View Documents** to generate the file note and view within the document store.

Document Generation

Generation of your Planning Consent 'File Notes' document has commenced and it will be available from this consent's 'Documents' tab within a few minutes.

VIEW DOCUMENTS

How to... Generate and edit a file note



5. Click the **Documents** tab when the Related Actions alternate method used.

The 'File Note' is shown in the documents listing at the top of the list.

6. Click **Enable editing**.

Planning Consent for Development Application: 21003080

UPLOAD DOCUMENTS GENERATE ASSESSMENT REPORT

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

< Development application 21003080

Document search

Search by Name
Search by Category
Search by Type

Where was the document uploaded?

Application
 Planning Consent
 Building Consent

Additional document filters

P&D Code Rules
 Snapshots
 Invoices
 Other Documents

System Generated Emails

Other

Superseded

Document	Type	Date Created	Superseded	Visible to Applicant	Edit
<input type="checkbox"/> FileNotes_planningConsent_cityOfAdelaide-89540.docx	File Note	29 Nov 2021 15:17		✘	Enable editing

7. Click on **Edit online** to open in Word online.

Additional document filters

P&D Code Rules
 Snapshots
 Invoices
 Other Documents

System Generated Emails

Other

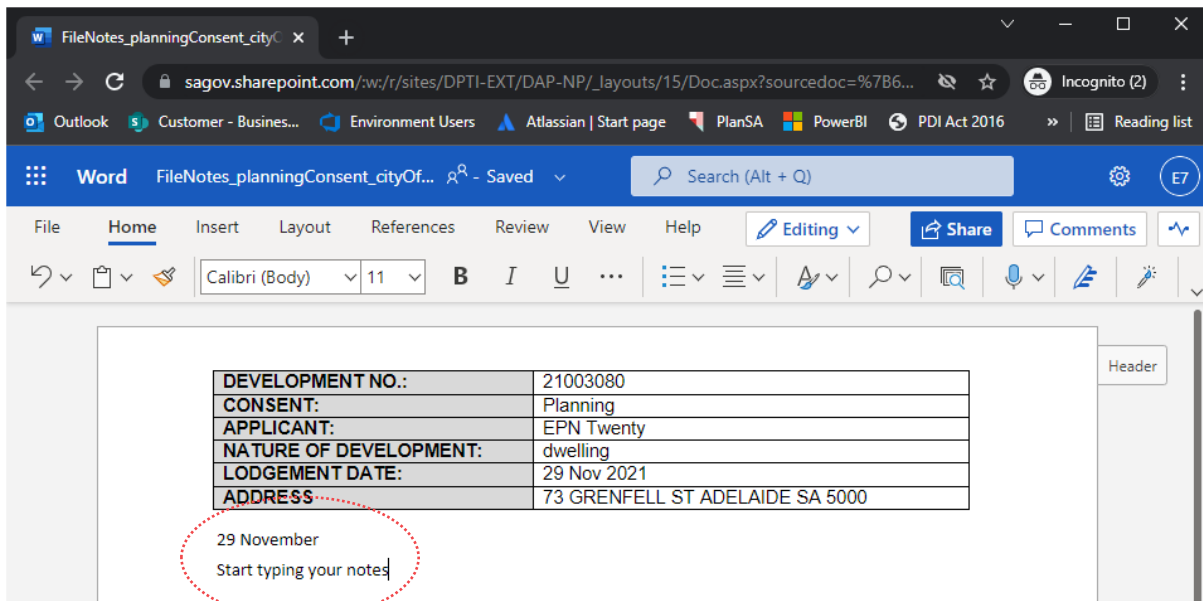
Superseded

Date Created	Superseded	Visible to Applicant	Edit
29 Nov 2021 15:17		✘	Edit online

Add a File Note

The File Note opens in a new Word Online tab and the header defaults with information from the development application, with information entered automatically saved.

8. Type directly into the file note any assessment notes, applicant correspondence etc.
9. Close 'X' File Note browser tab.



The planning consent Documents store is showing.

