

PATHWAY FUNCTIONALITY TO THE RESCUE

*How a creative approach to optimising
Pathway solved a business saga*



Just like an onion...

"Ogres are like onions, we both have layers"

AND so does a Building Permit!

THE BULB

At the core of the onion is the bulb - not visible to the eye but fundamental to its structure: this is the appointment of a private building surveyor (section 80) to any given job.

LAYERED RINGS

The Building permit itself (Section 30). All the accompanying documentation reflects the layers and layers of any given application

THE SKIN

Represents the completion of the job on behalf of the surveyor's client (e.g. Final Certificates or Occupancy Permits)



ONCE UPON A TIME...

We had a problem with incoming lodgements from Private Building Surveyors

- *Over 2,000 lodgements in a year*
- *Manual sorting of these lodgements*
- *98% were non-compliant with PCI*

These Private Building Surveyors were confused and frustrated

- *Reputation of 'being behind' other councils*
- *we advertise ourselves as 'future ready'*

We had limited funds and resources available to fix the problem

- *We needed to get creative*
- *What could we do, with what we already had?*





With onions and their layered nature in mind we looked long and hard at our existing lodgement process, and asked ourselves -

“How can we achieve compliance whilst ALSO integrating TRIM with Pathway AND achieve efficiencies overall?”

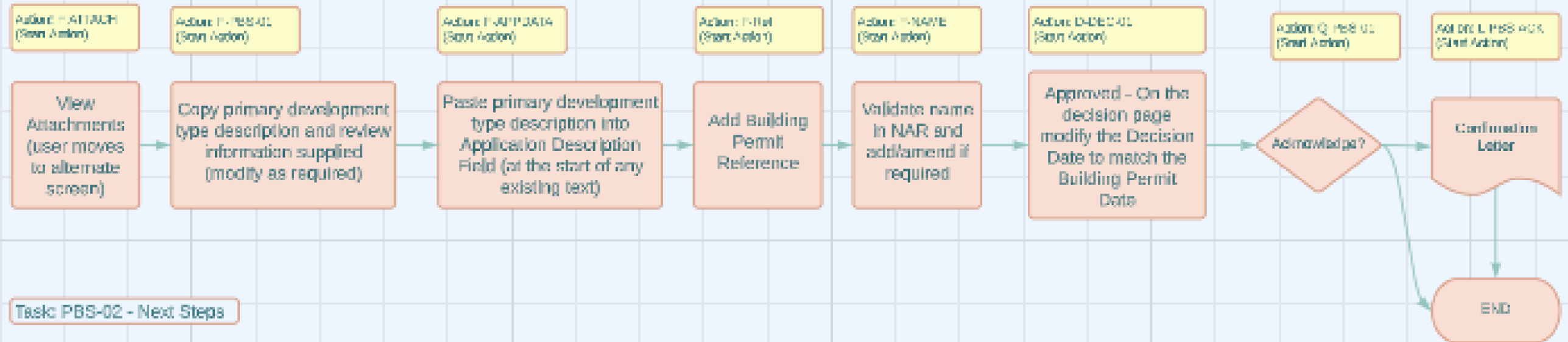


**SO WHAT
DID OUR
OLD
PROCESS
LOOK LIKE?**

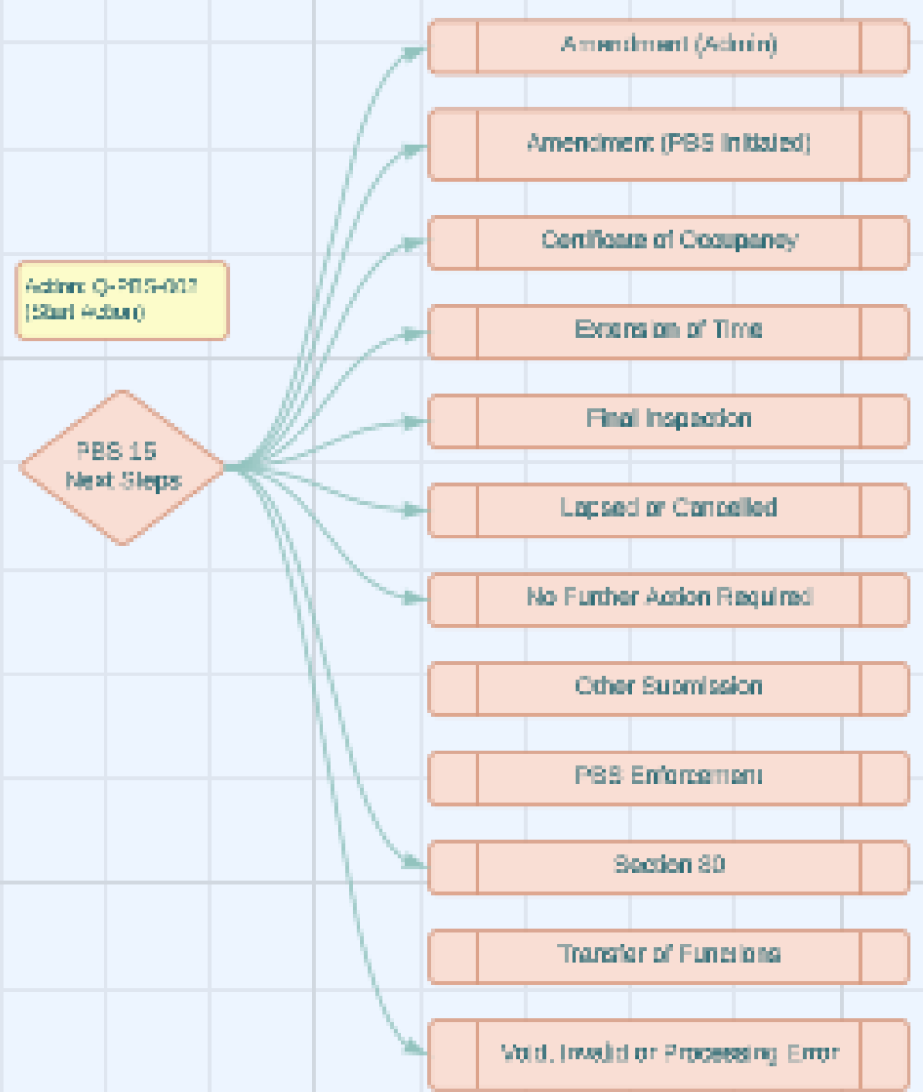


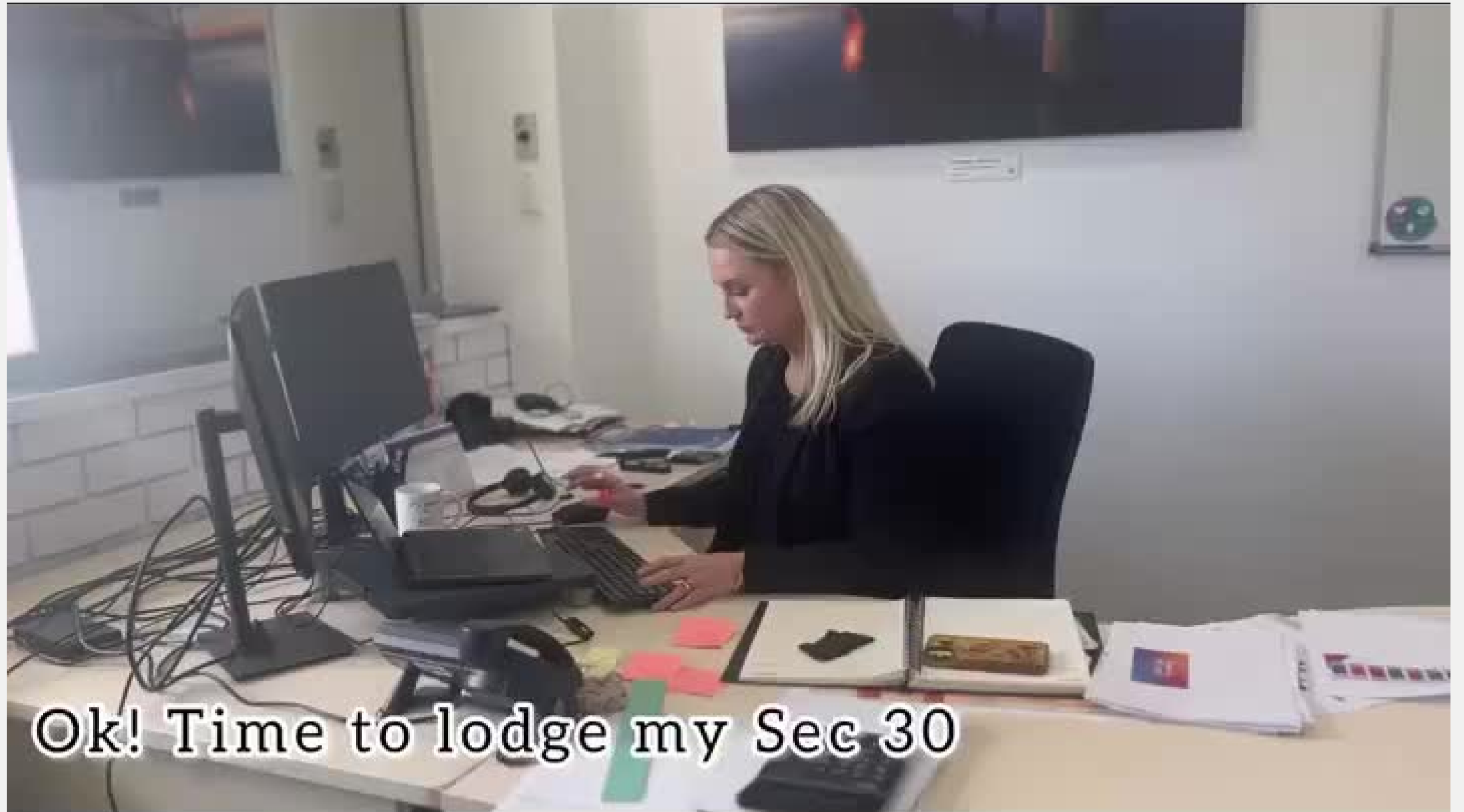
Applications Module:
Procedure: PBS-01 - Section 30 Lodgement
Tasks: PBS-01 - Section 30 Lodgement (Auto Start) and PBS-002 - Next Steps (User Start)

Task: PBS-01 - Section 30 Lodgement



Task: PBS-02 - Next Steps





Ok! Time to lodge my Sec 30

THE BEFORE

AS YOU CAN SEE THE OLD PROCESS WAS

◆ **NOT CLEAR**

◆ **RESTRAINED BY
SIZE**

◆ **FRUSTRATING**

◆ **CLUNKY**

◆ **NON COMPLIANT**

◆ **DUPLICATION**

◆ **INCONSISTENT**

◆ **TIME-CONSUMING!**



Intended Outcomes



CUSTOMERS

To utilise ePathway as a platform for all surveyors to upload every required document and accept the lodgement fee at time of submission



STAFF

To reduce time spent by centralising information into a single repository through the use of multiple modules and integration with supporting systems

HOW WE SLAYED THE DRAGON

1. Engaged internal & external stakeholders

2. *Created current and future state process maps*

3. *Considered all the requirements incl. Building Regs & PCI Compliance*

4. *Reduced application types from 25 to 1*

5. *Created a Customer Request with an associated 'in context' chart*

6. *Records Management Integration*

7. *Implemented new dashboards & reports*

8. *Added a lodgement portal to our website*



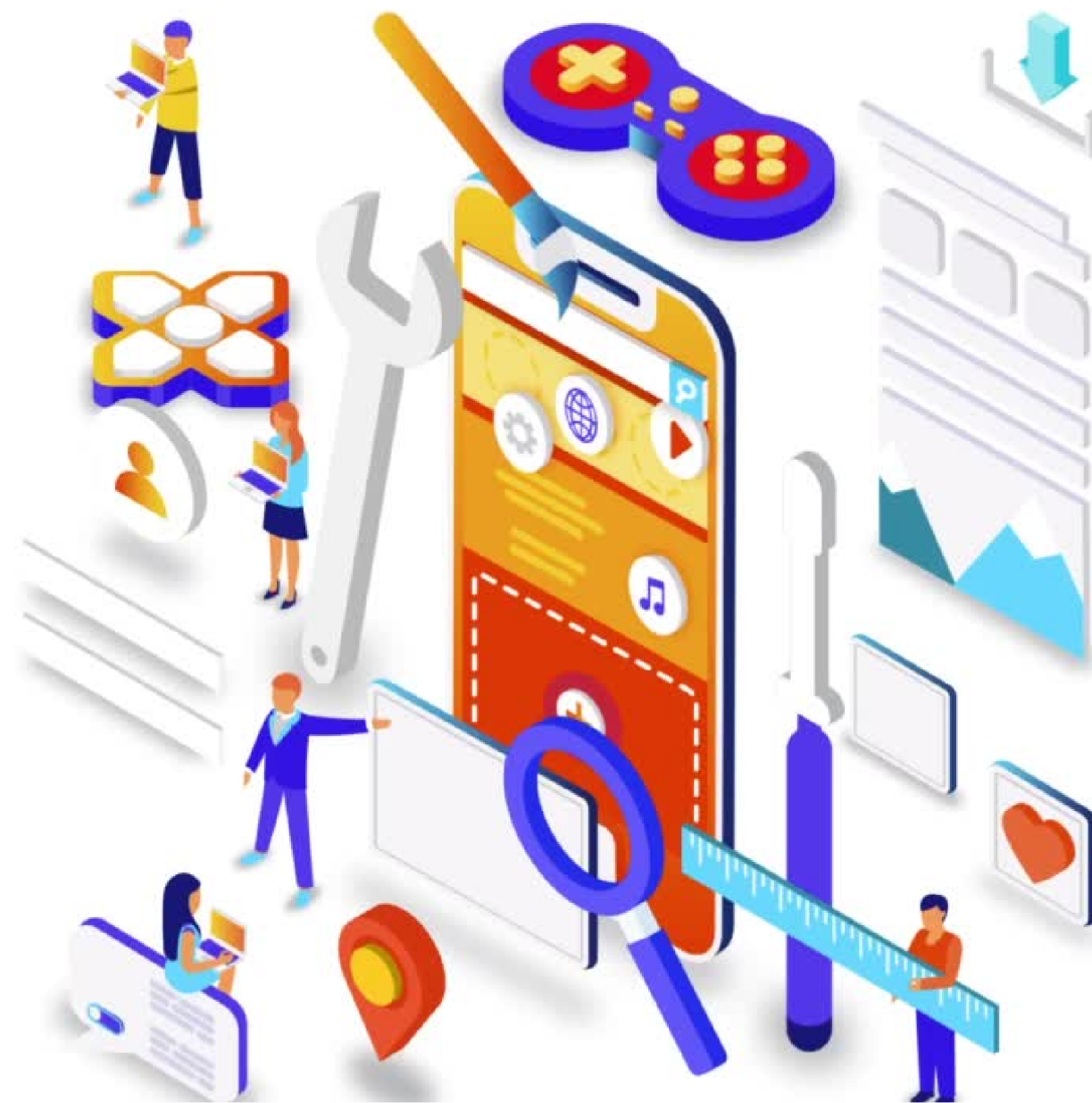
HOW WE SLAYED THE DRAGON

1. Engaged internal & external stakeholders



HOW WE SLAYED THE DRAGON

2. Created current and future state process maps



HOW WE SLAYED THE DRAGON

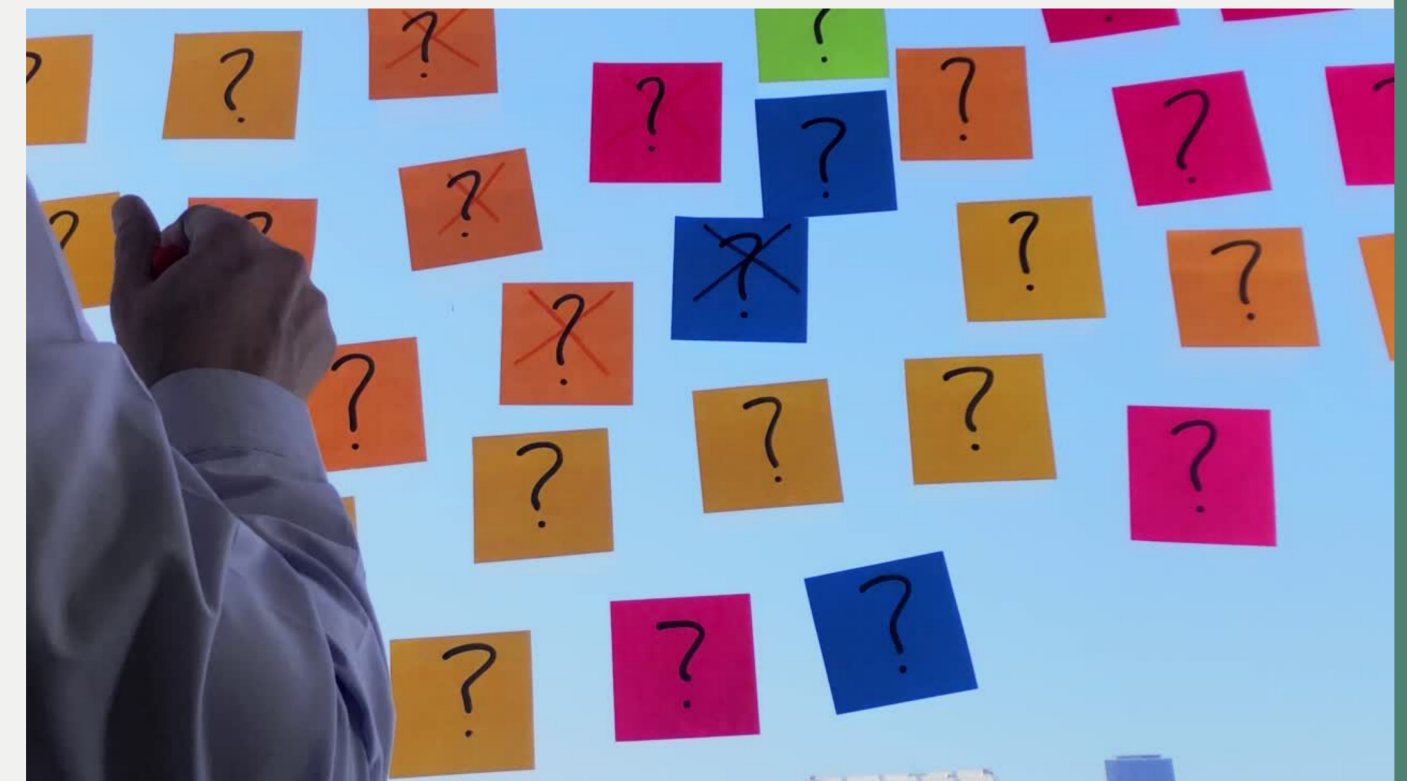
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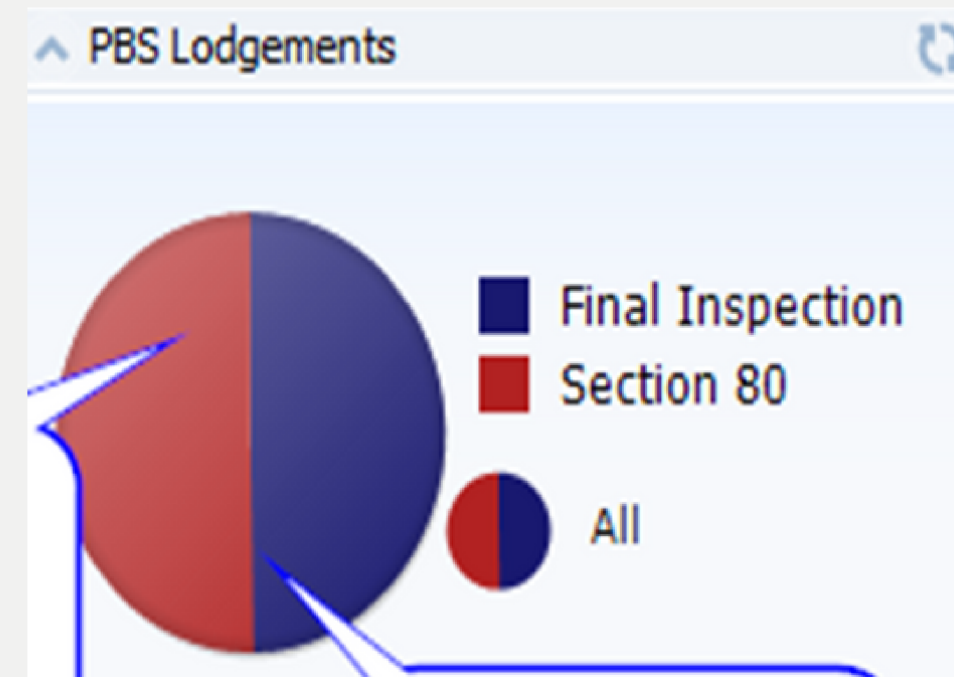
HOW WE SLAYED THE DRAGON



4. *Reduced application types from 25 to 1*



HOW WE SLAYED THE DRAGON



5. Created a Customer Request with an associated 'in context' chart

HOW WE SLAYED THE DRAGON



Find Browse Tag Current Search

Search for Search by Matching criteria

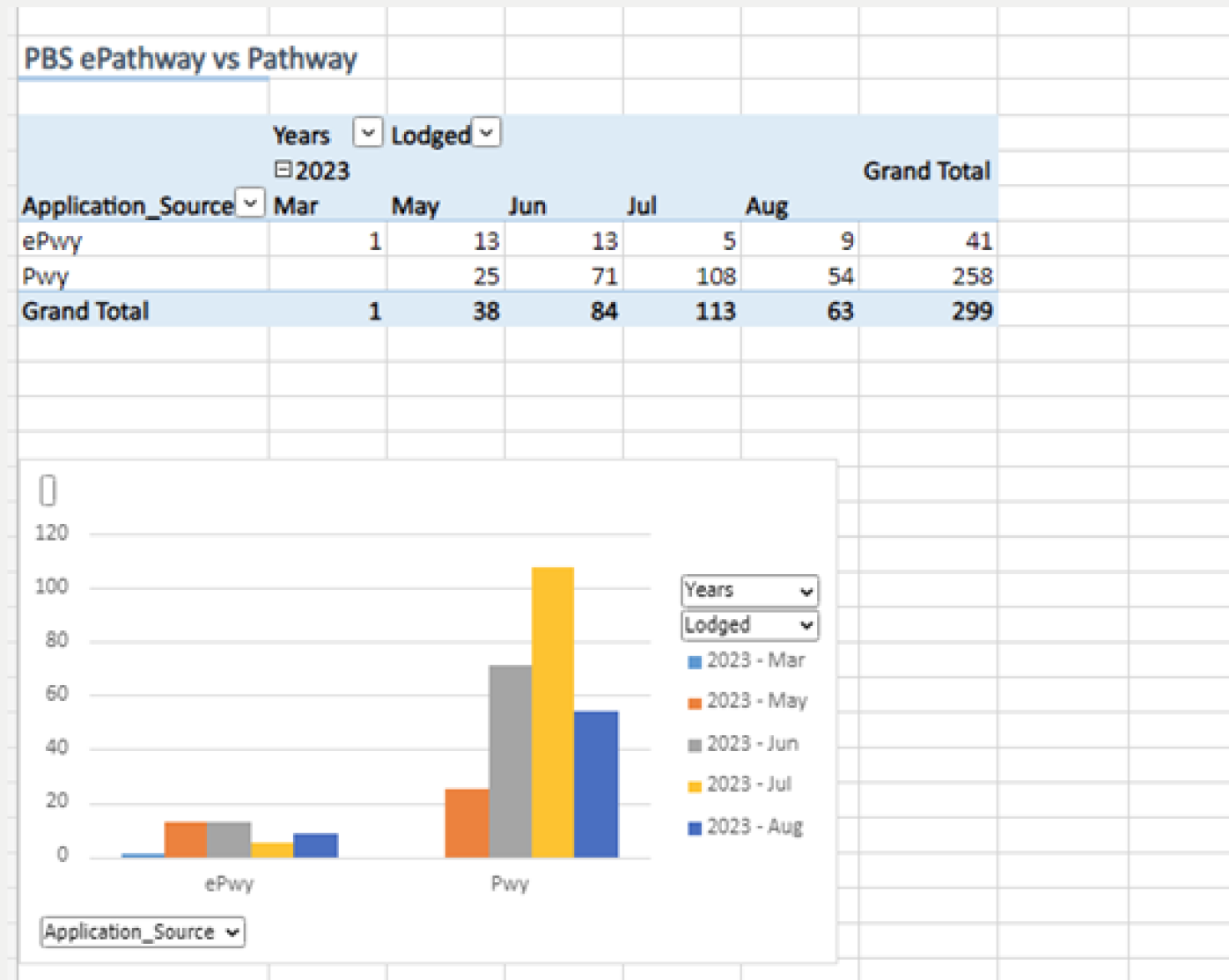
Records Title Word

Records - PathwayPrimaryKey:LAP/LAPAPPL/1553899

Record Number	Title	Creator	Date Created	Date Registered	Last Updated By	Date Last Updated
QA442344	Building Permits - 306-2023-PBS-S30 - 6 Poplar Grove, Langwarrin 3910	svc_inforPW_PRD_APP	17/08/2023 at 4:30 AM	17/08/2023 at 4:30 AM	svc_inforPW_PRD_APP	17/08/2023 at 4:30 AM
A4963056	306-2023-PBS-S30 - 6 Poplar Grove, Langwarrin 3910 - supporting document2	svc_inforPW_PRD_APP	16/08/2023 at 5:38 PM	17/08/2023 at 4:30 AM	svc_inforPW_PRD_APP	17/08/2023 at 4:30 AM
A4963057	306-2023-PBS-S30 - 6 Poplar Grove, Langwarrin 3910 - Endorsed build plan	svc_inforPW_PRD_APP	16/08/2023 at 5:38 PM	17/08/2023 at 4:30 AM	svc_inforPW_PRD_APP	17/08/2023 at 4:30 AM
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A4963055	306-2023-PBS-S30 - 6 Poplar Grove, Langwarrin 3910 - supporting document	svc_inforPW_PRD_APP	16/08/2023 at 5:38 PM	17/08/2023 at 4:30 AM	svc_inforPW_PRD_APP	17/08/2023 at 4:30 AM
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A4963051	306-2023-PBS-S30 - 6 Poplar Grove, Langwarrin 3910 - Form 2	svc_inforPW_PRD_APP	16/08/2023 at 5:38 PM	17/08/2023 at 4:30 AM	svc_inforPW_PRD_APP	17/08/2023 at 4:30 AM
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6. Records Management Integration

HOW WE SLAYED THE DRAGON



7. Implemented new dashboards & reports

HOW WE SLAYED THE DRAGON



How to apply

Section 80

Section 30

Other PBS documentation

Make sure you can lodge on the portal

All documentation associated with a Building Permit issued by the Relevant Building Surveyor.

Submit via the online portal

Follow the prompts to lodge your documentation.

[Lodge a Section 30 building permit](#)

Make a note of your reference number

Once submitted a reference number will be issued. Please use this reference number when submitting further information and finalisation of permits via email.

8. Added a lodgement portal to our website

THE AFTER

THE ENHANCED PROCESS IS

◆ **ACCESSIBLE**

◆ **EASY TO FOLLOW**

◆ **CENTRALISED**

◆ **MODERN**

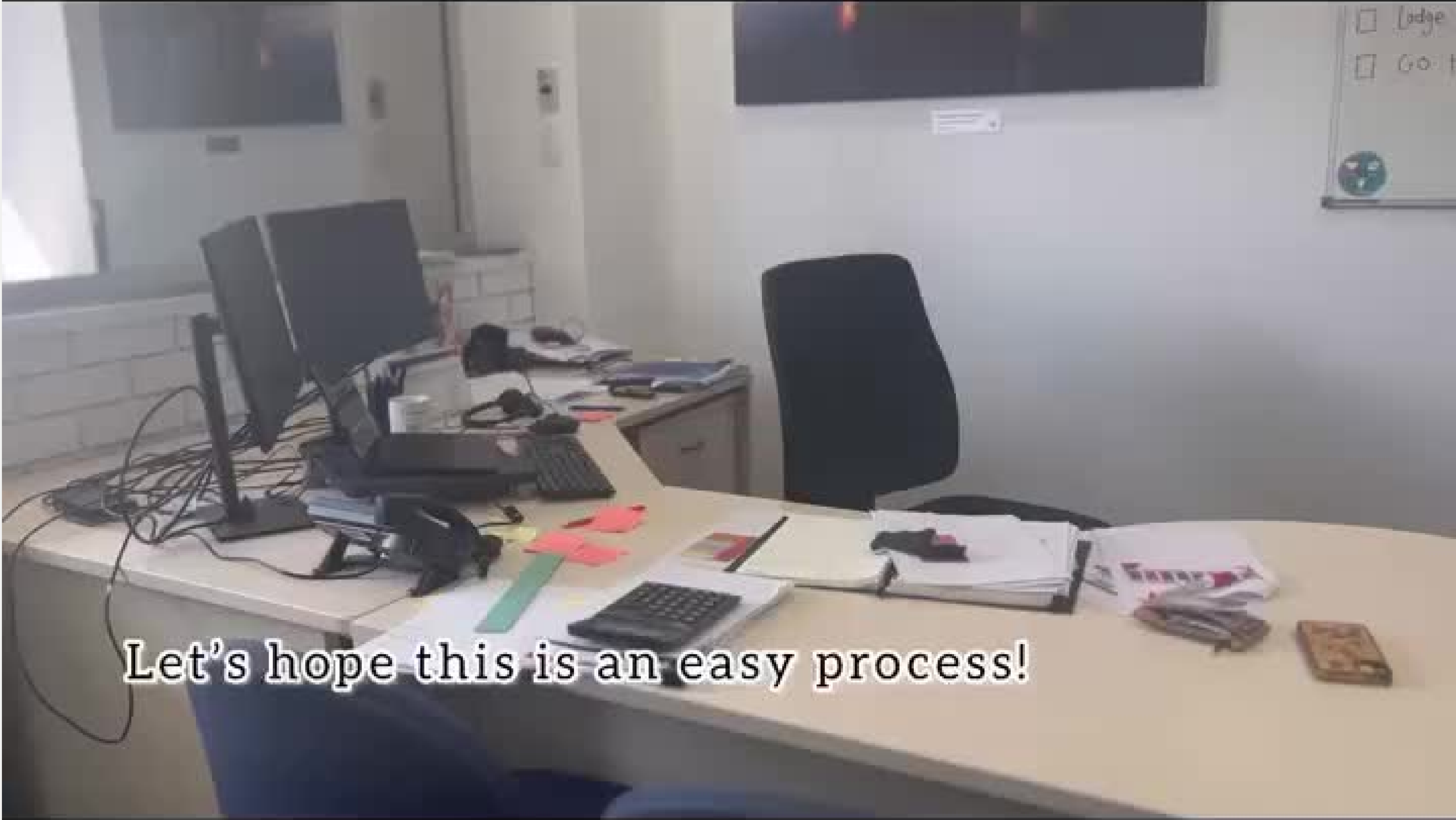
◆ **CONSISTENT**

◆ **TRANSPARENT**



**WHAT DOES
OUR
NEW
PROCESS
LOOK LIKE ?**



A photograph of a cluttered office desk. On the left, there are two computer monitors on a stand, a keyboard, and a mouse. In the center, there is a calculator, several sheets of paper, and several colorful sticky notes (yellow, orange, green). On the right, there are stacks of papers, a mobile phone, and other miscellaneous items. A black office chair is positioned behind the desk. In the background, there is a whiteboard with some text and a chalkboard.

Let's hope this is an easy process!

- External Systems
 - Document Management
 - GIS
- Attachments
 - Audit
 - Memo
- Paperclip
- Options
 - Amendments
 - Application Data
 - Application Dimensions
 - Application Fees
 - Building Classifications
 - Change Application Type
- Customer Requests
 - Decisions
 - Delete Application
 - Development Categories
 - Email History
 - Letters
- Locations
 - Miscellaneous Data
- Names
 - Notes
 - Permits and Certificates
- Property Conditions
 - References
 - Related Applications
- Related Licences
 - Workflow
- Zones and Land Uses
 - Infringements
- Processes
 - Print

Link to Trim Folder

All documents submitted are accessible here or from the Trim folder

We have customised the form to show the class type.

We have also customised the fee name for clarity

Payments are made on lodgement by the customer as a mandatory field and allocated to the application.

The physical documentation submitted with the CRM are saved into a temporary Trim holding folder to be moved once the Building Permit (section 30) application has been lodged and the permanent Trim folder is created.

This is the incontext chart showing all the CRM lodged against the property address

Information for this existing item have not been modified yet.

Private Building Surveyor Section 30

Reference 1621-2021-PBS-S30 Application Source ePathway

Lodged

This is the description box

Decision (No records exist sorted by Decision Date)

No records exist

S30 Fee (All 5 records)

Fee Status	Fees	Bank Guarantee or Bond
Accepted	123.70	<input type="checkbox"/>
Paid	-123.70	
Balance	0.00	
Deposit Refunds	0.00	
Fee Refunds	0.00	

Locations (All 1 record)

2 Oban Street, Frankston 3199

Names (All 6 records)

- Applicant - P M Elias
- Applicant - R S Elias
- Private Building Surveyor - Charmian Gaskill
- Private Building Surveyor - PBS R. Us
- Owner - P M Elias
- Owner - R S Elias

Dates (All 2 records)

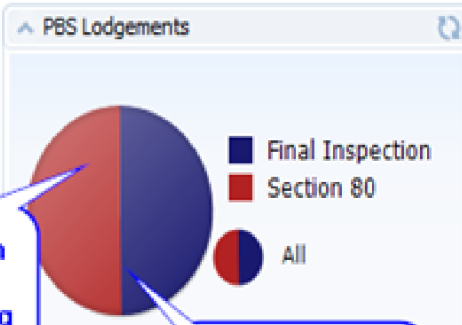
- Application 6/12/2022
- Lodgement 6/12/2022

Workflow (All 2 records)

Details Start Task Continue Task Complete Task Repeat Task

Task	Started	Due	Completed	Responsibility
Section 30 Lodgement		18/08/2023 7:49:13 AM		Workflow Group
Next Steps		23/08/2023 7:49:13 AM		Workflow Group

All CRM associated are processed through the next steps workflow tasks - linked - documents moved to permanent trim folder and closed. Once closed they are no longer visible in the incontext chart to reduce confusion if additional permits for this address are applied for.



Options

- External Systems
 - Document Management
 - GIS
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1621-2021-PBS-S30 - Building Applications Summary

Close

Details for this existing item have not been modified yet.

Private Building Surveyor Section 30

Reference: Application Source:

Status:

Description:

Once the Section 30 Lodgement workflow has been completed and the decision and other required information has been confirmed or added the next steps workflow can be started to link to the CRM for the incontext chart.

Decision (All 2 records sorted by Decision Date)

Decision	Date	Status
Certificate of Final Inspection	17/08/2023 8:59:01 AM	Final
Permit Approval	15/08/2023 8:54:50 AM	Final

Fee (All 5 records)

Fee Status	Fees	Bank Guarantee or Bond
Accepted	123.70	<input type="checkbox"/>
Paid	-123.70	
Balance	0.00	
Deposit Refunds	0.00	
Fee Refunds	0.00	

Locations (All 1 record)

2 Oban Street, Frankston 3199

Dates (All 3 records)

Application	6/12/2022
Lodgement	6/12/2022
File Started	15/08/2023

Names (All 6 records)

Applicant - P M Elias
Applicant - R S Elias
Private Building Surveyor - Charmian Gaskill
Private Building Surveyor - PBS R Us
Owner - P M Elias
Owner - R S Elias

Workflow (All 6 records) Insert Delete Task

Details Start Task Continue Task Complete Task Repeat Task

Task	Started	Due	Completed	Responsibility
Section 30 Lodgement	17/08/2023 8:52:42 AM	18/08/2023 7:49:13 AM	17/08/2023 8:55:00 AM	Julie Redhouse
Next Steps	17/08/2023 8:55:12 AM	22/08/2023 8:55:00 AM	17/08/2023 8:55:56 AM	Julie Redhouse
Section 80	17/08/2023 8:55:23 AM	18/08/2023 8:55:22 AM	17/08/2023 8:55:55 AM	Julie Redhouse
Next Steps	17/08/2023 8:58:06 AM	22/08/2023 8:55:22 AM	17/08/2023 8:58:44 AM	Julie Redhouse
Final Inspection	17/08/2023 8:58:45 AM	18/08/2023 8:58:44 AM	17/08/2023 8:59:22 AM	Julie Redhouse
Next Steps		22/08/2023 8:58:44 AM		Workflow Group

Next Steps workflows to link and process the CRM

Cancel and Complete | Continue

One Answer must be selected.

Selected Task

Task Type: **PBS-15** | Next Steps

Question Details

What are the next steps?

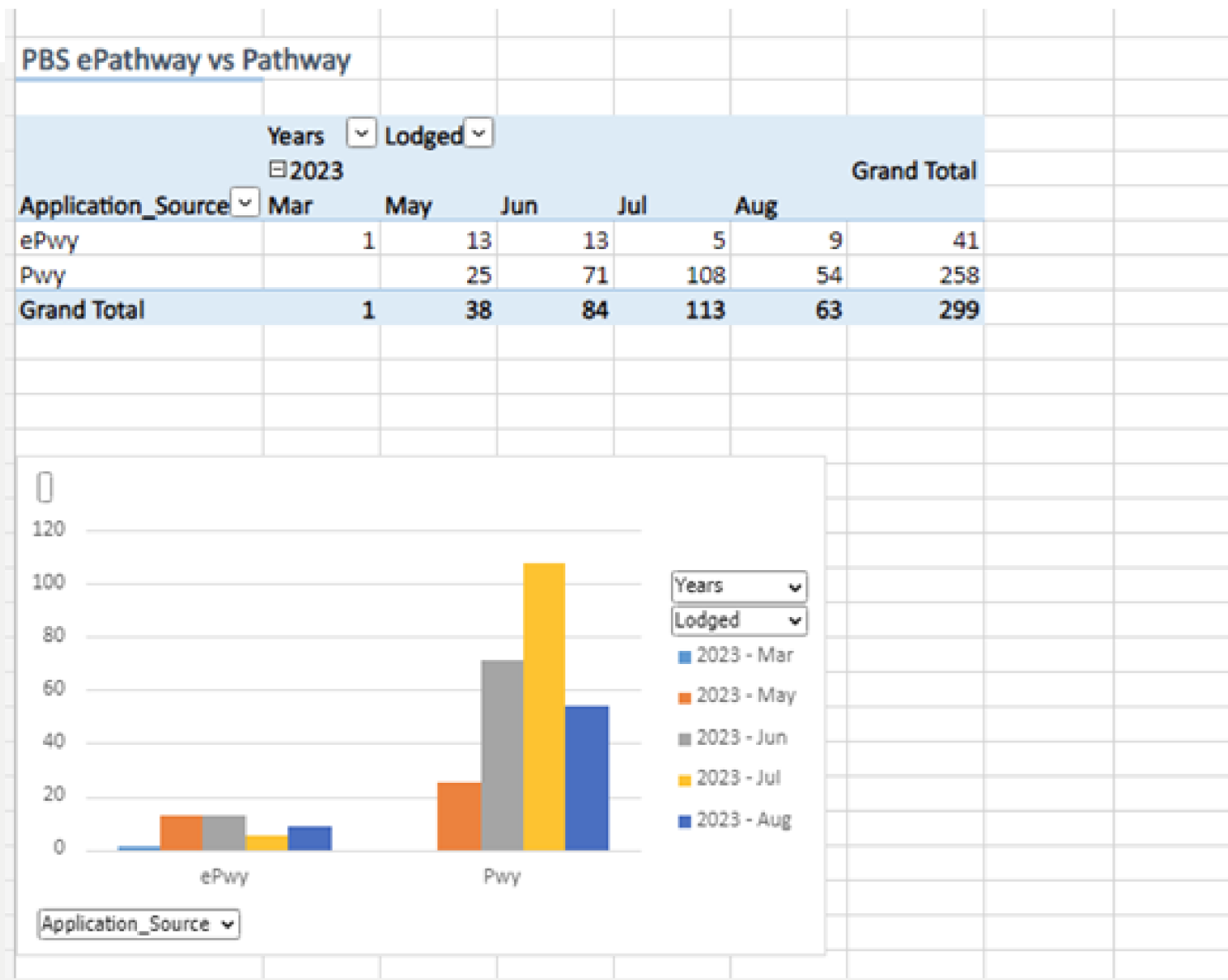
Answer(s) (All 12 records)

Selected	Answer
<input checked="" type="checkbox"/>	Amendment (Admin)
<input type="checkbox"/>	Amendment (Admin)
<input type="checkbox"/>	Certificate of Occupancy
<input type="checkbox"/>	Extension of Time
<input type="checkbox"/>	Final Inspection
<input type="checkbox"/>	Lapsed or Cancelled
<input type="checkbox"/>	No Further Actions (at this stage)
<input type="checkbox"/>	Other
<input type="checkbox"/>	PBS Enforcements
<input type="checkbox"/>	Section 80
<input type="checkbox"/>	Transfer of Functions
<input type="checkbox"/>	Void, Invalid or Processing Error

Answer Details

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INTEGRATION

FILE SIZES

REPORTING

SYSTEMS

CHANGE

THROUGH THE VERSATILITY OF PATHWAY, WE MANAGED TO FINALLY LINK ALL INCOMING INFORMATION IN A WAY THAT WAS MEANINGFUL, COORDINATED AND ACCESSIBLE.

WE GREW THE PERFECT ONION!



A HAPPY ENDING

THANKS TO SMART UTILISATION OF PATHWAY, STAFF AT FRANKSTON CITY COUNCIL ARE WORKING TOGETHER LIKE NEVER BEFORE.
...AND HAPPILY EVER AFTER!

- Using the CRM and the Applications module in Pathway we created one tidy lodgement
- Compliant & Mandatory payment process for Section 30's
- Frankston City Council now enjoys an improved reputation
- Our customers are loving our new streamlined process
- The Building services team now come to work with smiles on their faces!



QUESTIONS?

