Biodiversity Offsets and Agreement Management System (BOAMS) Guide for Accredited Assessors

Department of Planning and Environment

NSW GOVERNMENT

Acknowledgement of Country

The Department of Planning and Environment acknowledges the Traditional Custodians of the lands where we work and live.

We pay our respects to Elders past, present and emerging.

This resource may contain images or names of deceased persons in photographs or historical content.

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Purpose of this guide

This guide aids accredited assessors (assessors) when using the Biodiversity Offsets Agreement Management System (BOAMS) to:

- find and understand information in BOAMS
- create and manage accounts
- create an assessment case
- manage cases
- list an expression of interest (EOI)
- make a listing on the credit demand register
- seek further help using BOAMS.

This guide provides examples of how to enter information in BOAMS and progress cases. Information in some of the examples has been redacted to protect privacy.

The Department of Planning and Environment (the department) will review and update this guide periodically to incorporate new information.

Overview of the Biodiversity Offsets and Agreement Management System

Introduction

BOAMS is the case management system used to administer the Biodiversity Offsets Scheme (the scheme).

BOAMS is used by accredited assessors to carry out Biodiversity Assessment Method (BAM) related tasks, such as:

- applying the BAM at a site
- submitting BAM assessment data to accompany an application for development, clearing or a biodiversity stewardship agreement (BSA)
- generating a biodiversity credit outcome.

Assessors must use the Biodiversity Assessment Method Calculator (BAM-C) in BOAMS for assessing and submitting applications for stewardship, development and vegetation clearing proposals.

BOAMS is also used by:

- the department to manage BAM credits, including transfer, retirement, suspension and cancellation
- the Credits Supply Taskforce (the Taskforce) to finalise BSAs and issue credits
- consent authorities, including local government and state agencies, to access a BAM-C case related to a Biodiversity Assessment Report (BAR)
- community users, to perform a limited range of tasks.

Responsibility for various functions within BOAMS is shared by teams across the department.

Relationship to other guidance

This document guides assessors on how to use BOAMS. Assessors should continue to refer to BOS Updates, available on the ‘Assessor resources’ webpage, for interim guidance on enhancements and changes to BOAMS.

Guidance for assessors on using the BAM-C is available in the *Biodiversity Assessment Method (BAM) Calculator User Guide*.

Guidance for the general public using BOAMS is available in the *Biodiversity Offsets and Agreement Management System (BOAMS) Guide for Community Users*.

Navigating BOAMS

Assessor access to BOAMS

Access to BOAMS for an assessor is via the Biodiversity Accredited Assessor System (BAAS) (Figure 1). Access to assessor functions within BOAMS, including access to the registered version of the BAM-C, will be provided upon receiving accreditation.

Access to BOAMS for assessors differs from other types of roles in the scheme as assessors are the only account type that can create and edit cases in the BAM-C.

BOAMS is best accessed via the internet browsers Chrome and Firefox. If you forget your password, there is a 'Forgot your password?' function available.

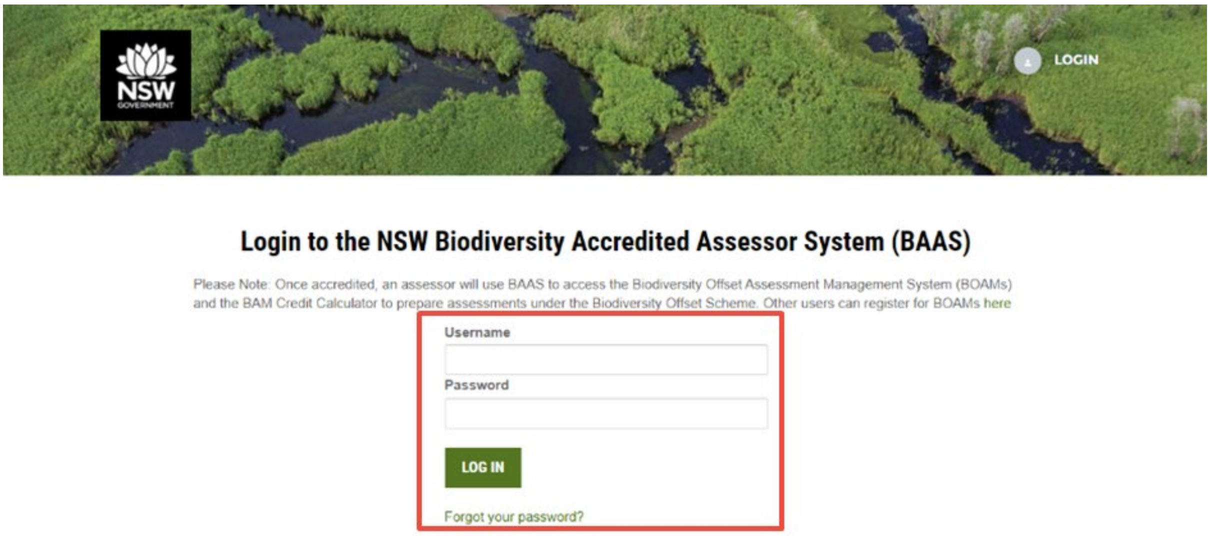


Figure 1 BAAS login page

If you have any issues with logging in to BAAS, please contact the BAM Accreditation Mailbox at BAM_accreditation@environment.nsw.gov.au.

BOAMS community users

The general public can access BOAMS as a community user to perform a limited range of tasks. A community user account will create a customer account in BOAMS.

If an assessor creates an account for a person who then wishes to log into BOAMS as a community user, this person will need to contact the Transactions and Systems (TAS) Team at BOSCREDITS@environment.nsw.gov.au. The TAS Team will assist in finalising set-up of these accounts so they can be accessed as a community user.

If a member of the general public wants to register for access to BOAMS, they must create an account via the 'Biodiversity Offsets and Agreement Management System' page on the department's website.

Other functionalities in BOAMS for community users are currently under development.

Please refer to the *BOAMS Community User Guide* for detailed guidance on using BOAMS as a community user.

Navigating the BOAMS landing page

Assessors can view, edit, and find information using the tiles on the BOAMS landing page (Figure 2):

- 'Home' icon – return to the BOAMS landing page
- 'My Profile' – view information about your accreditation and edit your contact details
- 'My Development/Clearing Assessment Cases' – view a list of your existing development/clearing assessment cases and open a case
- 'My Stewardship Assessment Cases' – view a list of your existing stewardship assessment cases and open a case
- 'My Cases' – view a list of all of your existing cases and open a case
- 'News' – this icon is currently being used as a placeholder for a PCT ID list
- 'FAQ' – access the current versions of the BOAMS user guide
- 'Renewal Cases' (appears when relevant) – view BAAS renewal application cases.

Note that clicking on the 'News' tile will open a new tab in your web browser. To get back to the BOAMS landing page, please close this tab and click on the tab in your web browser titled 'Home'.

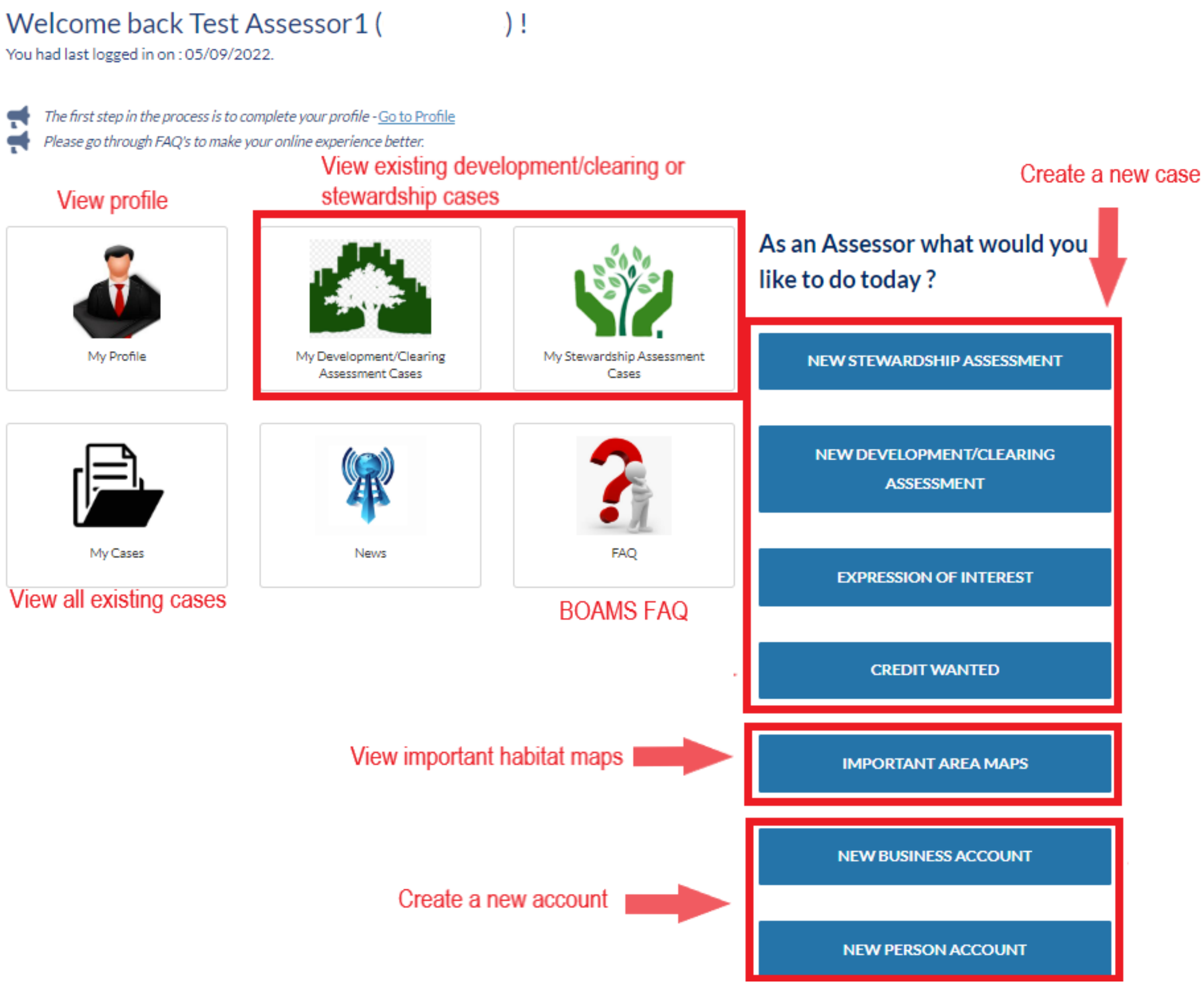


Figure 2 **BOAMS landing page where an assessor can view, edit and find information, and perform tasks**

Finding and understanding information in BOAMS

Table 1 provides explanations of the relevant BOAMS fields to successfully undertake BAM assessments and subsequent applications to transfer or retire credits. Figure 3 shows a typical case page indicating where to find important information.

Table 1 **Descriptions of BOAMS fields**

BOAMS field name	Format in which it appears	Description	Location of information
Case	Not applicable	A high-level entry into BOAMS. Different activity types in BOAMS are called cases. Types of cases in BOAMS include: • development/vegetation clearing case • application for stewardship • EOI • credit wanted (demand).	Not applicable
Customer Account number	C-XXXXXX	This is a trackable number for a person or business account. All case parties will be linked to a customer account.	When an assessor creates a new account for a person or organisation (business) in BOAMS, an email containing the customer number will be sent to the email address provided when creating the account. Where an assessor has created the account, the assessor should also provide the number to the customer. It is recommended the customer number be stored for future reference.
Parent Case	8-digit number	This is the top-level case that is associated with an assessment case. Case-related entities such as parties, landholdings, lots, and credits can be linked to the parent case.	When viewing development, clearing or stewardship assessment cases, the parent case number is listed in the 'application number' column.
Related Case	8-digit number	The case/s for application for and assessment of a development, clearing or stewardship site linked to a parent case.	While viewing a parent case, navigate to related cases. Click 'view all' to view a list of related cases and their numbers.
Parent Case Party ID	CP-XXXX	An individual or business that is listed under 'Case Parties' on the parent case. The case party type defines the role of the person/business on a particular case.	While viewing a parent case, navigate to case parties. Click 'view all' to view a list of parent case parties and their case party IDs.

BOAMS field name	Format in which it appears	Description	Location of information
Credit Holding	CH-XXX	Contains all credits created by a BSA, or all credits transferred to a customer in one transaction.	Provided by the Taskforce to the landholder when a BSA is registered. TAS Team should be contacted if any information about a credit holding is required.
Credit ID	CR-XXXX	A unique BOAMS number for credits of a certain class that are associated with a credit holding.	Provided by the Taskforce to the landholder when a BSA is registered. The TAS Team should be contacted if any information about a credit ID is required.
Credit Status Availability	Credit status	The status of a credit. This will include: • issued credits – credits that are in supply and may be available for purchase • pending review – credits that still need assessment/approval • EOI – credits that have the potential to be created on a biodiversity stewardship site on the credit supply register • credit wanted listings (potential credit demand) • cancelled – credits that are in a cancelled status under the provisions of the *Biodiversity Conservation Act 2016* (BC Act) • suspended – credits that are in a suspended status under the provisions of the BC Act • equivalence – credits that have been created under Biobanking and have undergone a reasonable equivalence assessment to calculate the equivalent value under the scheme. The number of credits shown is the number of equivalent-to-scheme credits available. The IDs for these credits are different, they are formatted 'BIMS-CR-XXX'.	This information is found on the scheme public registers.

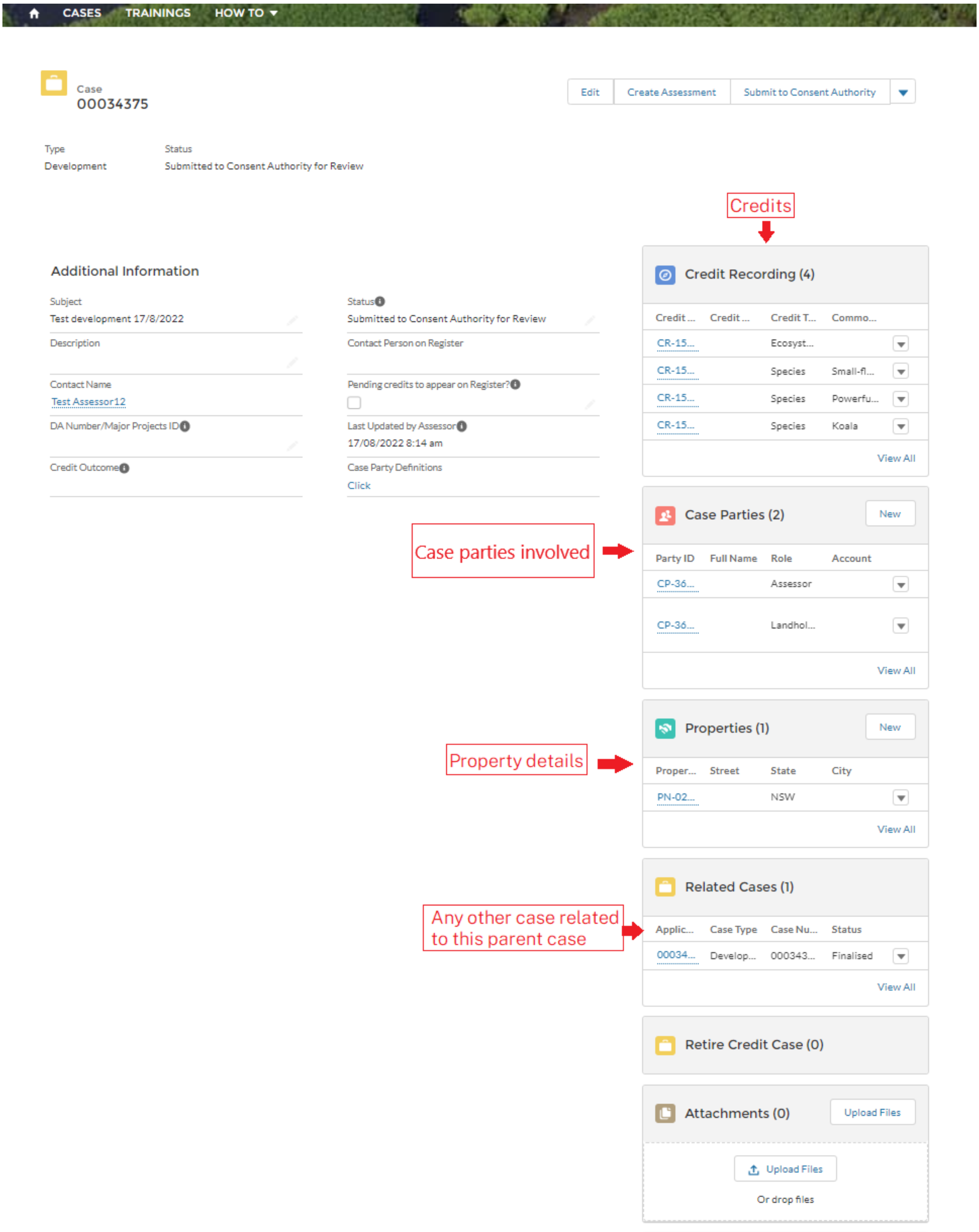


Figure 3 **Where to find critical information in BOAMS**

Account management

Key account management information

- BOAMS accounts hold information about participants in the scheme.
- A BOAMS account must be created for any person or organisation whether they are a landholder, a credit buyer, or an authorised person.
- The department has implemented processes to ensure each person or business only has one BOAMS account.
- It is important that each person or business is accurately identified on a BOAMS account as the linkage of account owners to credit holdings or obligations ultimately governs management of information associated with their assets or obligations. The department will identify account owners before releasing information about biodiversity credits or obligations.

Introduction

BOAMS accounts are the central location for information about proponents of proposals requiring assessment under the BAM and other participants in the scheme.

BOAMS uses 2 customer account types – individual accounts and organisation (business) accounts. An account must be created for any person or organisation whether they are a landholder, a credit buyer, or an authorised person. Once an account has been created, they can then be linked to a case as a case party.

It is recommended that assessors record the customer number for any accounts created and provide it to the customer. This is important as the customer will require their BOAMS customer number to be added as a case party to future cases and for any biodiversity credit transactions in the scheme.

Please note it is important that each person or business only has one BOAMS account.

If you are unsure whether your client already has an account in BOAMS, please contact the TAS Team, who will advise whether an account exists with your client's details.

If your client doesn't have an account in BOAMS, please refer to the steps for creating an account under 'Accounts, roles and identity numbers' below.

Importance of BOAMS account management

It is important that all people and businesses involved in the scheme and BOAMS are correctly identified to ensure appropriate account management and governance of credit transactions. It is also important that people and businesses do not have duplicate accounts in BOAMS.

Information in BOAMS about credit owners and those with a credit obligation is sensitive and important information. Information about someone with a legal right to act on behalf of those entities is also sensitive and important. Accurate identification will help reduce potential time delays and any complexities in processing future applications for credit transfer and retirement. How people are linked to credit holdings or obligations ultimately governs management of information associated with their assets or obligations.

Individuals who are not credit holders or authorised representatives of credit holders cannot be given access to BOAMS account details, which may contain sensitive information.

Assistance with BOAMS

Responsibility for various functions within BOAMS is shared by the BOS Branch within the department and the Taskforce. Table 2 identifies common issues and provides a contact email address for the responsible team. Please note that the BOS Branch may request additional information to prove your identity where an issue relates to BOAMS access and existing accounts.

Table 2 Teams and email addresses to direct enquiries

Issue	Contact
General enquiries regarding the scheme	BOS.helpdesk@environment.nsw.gov.au
Accessing BOAMS – reset password	BAAS Accreditation mailbox BAM_accreditation@environment.nsw.gov.au
Accounts – creation, updating details, retrieving, customer number	BOSCREDITS@environment.nsw.gov.au
Linking accounts to cases	BOSCREDITS@environment.nsw.gov.au
Development cases	BOS.helpdesk@environment.nsw.gov.au
Stewardship cases	stewardship@environment.nsw.gov.au creditssupplyfund@environment.nsw.gov.au
EOI – initial listing	stewardship@environment.nsw.gov.au
EOI – system errors or issues	BOSCREDITS@environment.nsw.gov.au
Credit wanted cases	BOSCREDITS@environment.nsw.gov.au
Public registers – issued credits, pending credits, EOI listings	BOSCREDITS@environment.nsw.gov.au
Public registers – credit wanted listing	BOSCREDITS@environment.nsw.gov.au

Accounts, roles and identity numbers

Account purpose and types

There are 2 types of accounts in BOAMS – individual (new person) and organisation (business) accounts.

Individual (new person) account

An individual account is created for an individual landholder, authorised person or contact person.

Organisation (business) account

Organisation (business) accounts are created for corporations or businesses, such as those who own land that is proposed for a BSA, or land that is the subject of a planned development.

Roles

An account in BOAMS will be necessary for the following roles in the scheme:

- a landholder (organisation or individual) entering into a BSA or who is the proponent for development or vegetation clearing
- an authorised person for any other account holders, who has legal authority to act on behalf of the landholder
- a contact person for the public register. It is a requirement that the contact person on the public register is also an authorised person who has legal authority to act on behalf of the landholder.

Case party

Different activity types in BOAMS, such as a stewardship agreement or development proposal are called cases. Once an account is created, that person or organisation can be linked to a case as a case party.

Creating accounts and managing accounts

You are required to use full legal names when creating an account. This requirement extends to organisations and all individuals in the system. The department will check names before any account is used in any transaction. The department will also check your authority to engage in any transaction.

If any information on a BOAMS account is incorrect or outdated when compared to subsequent applications made to the department, the department will seek confirmation of the correct details and amend the account details if necessary.

When a new account is created, BOAMS will send an automated email containing the BOAMS customer number to the email address used to create the account. Users should keep this record of their BOAMS customer number and the email used to create their account in a secure location. Treat it as you would treat your bank account details.

Creating an individual (new person) account

To create an account for an individual person, use the ‘New Person Account’ button on the landing page (Figure 4). This button should be used to create an account for an individual landholder, authorised person or contact person.

When entering an individual’s name, use their full legal name; for example, include their middle name if this appears on legal documents (driver licence, passport, or land title) (Figure 5).

Each individual must have their own unique email linked to their account. This is to enable individuals to access information related to their own financial matters only.

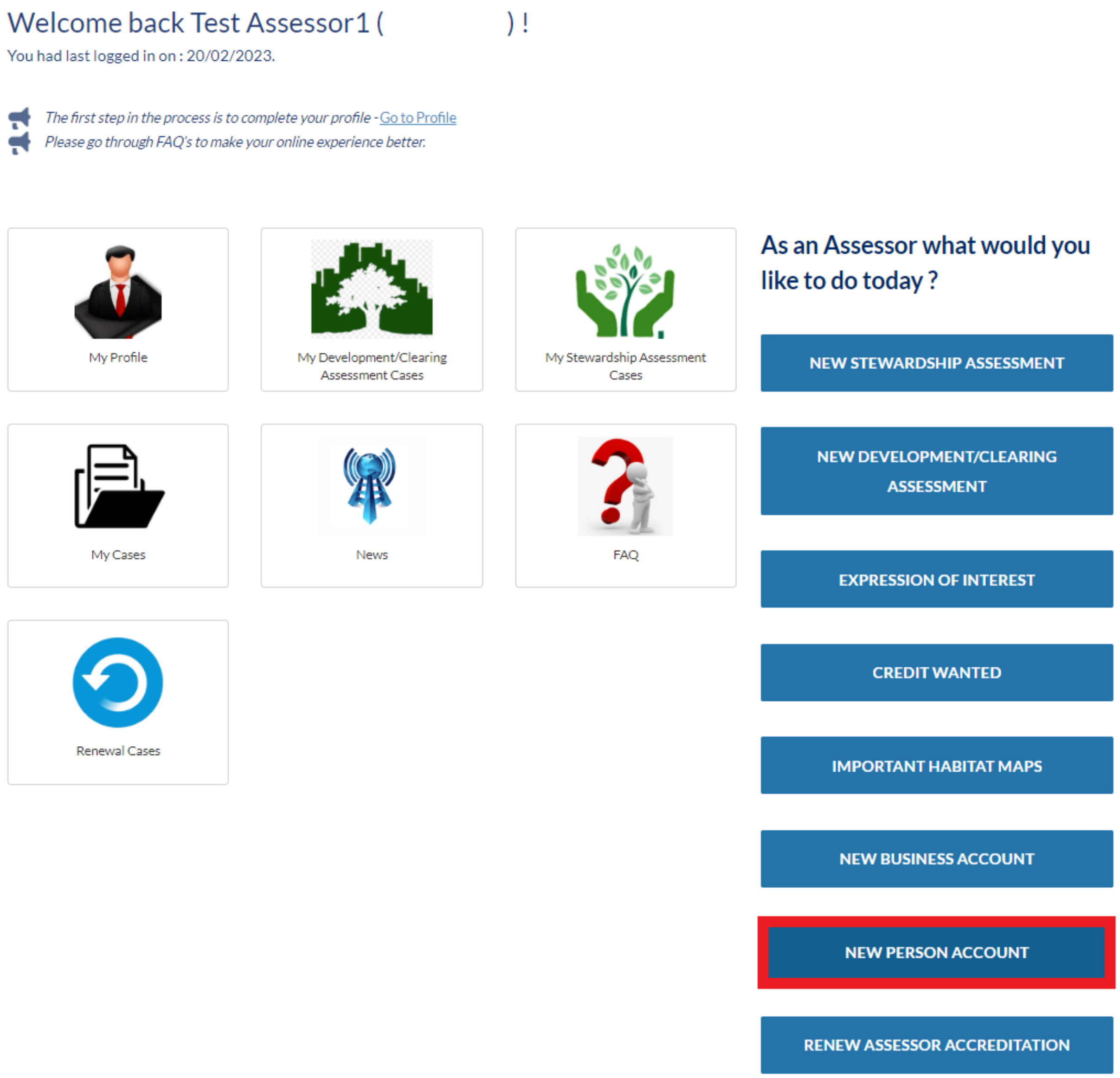


Figure 4 ‘New Person Account’ button on the BOAMS landing page

Note: Information in some of the examples below has been redacted to protect privacy.

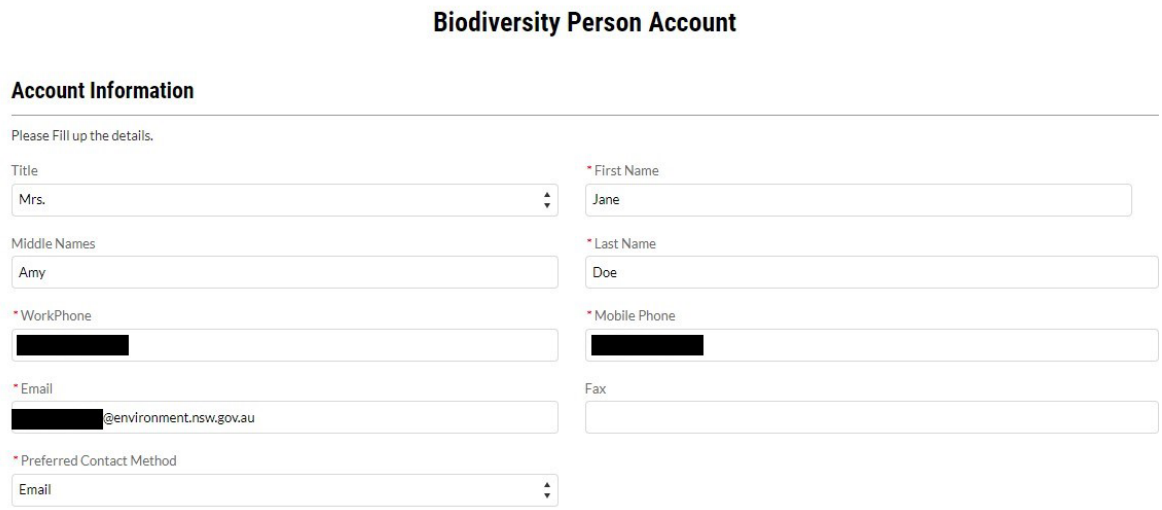


Figure 5 **Example of a person account creation page – name and contact details**

Please fill out all fields denoted with an * as these fields are mandatory. Use your full legal name as it appears on your driver licence/passport (Figure 5). Select 'Save' (Figure 6). Confirmation of account creation, including the new customer number, will appear on screen (Figure 7).

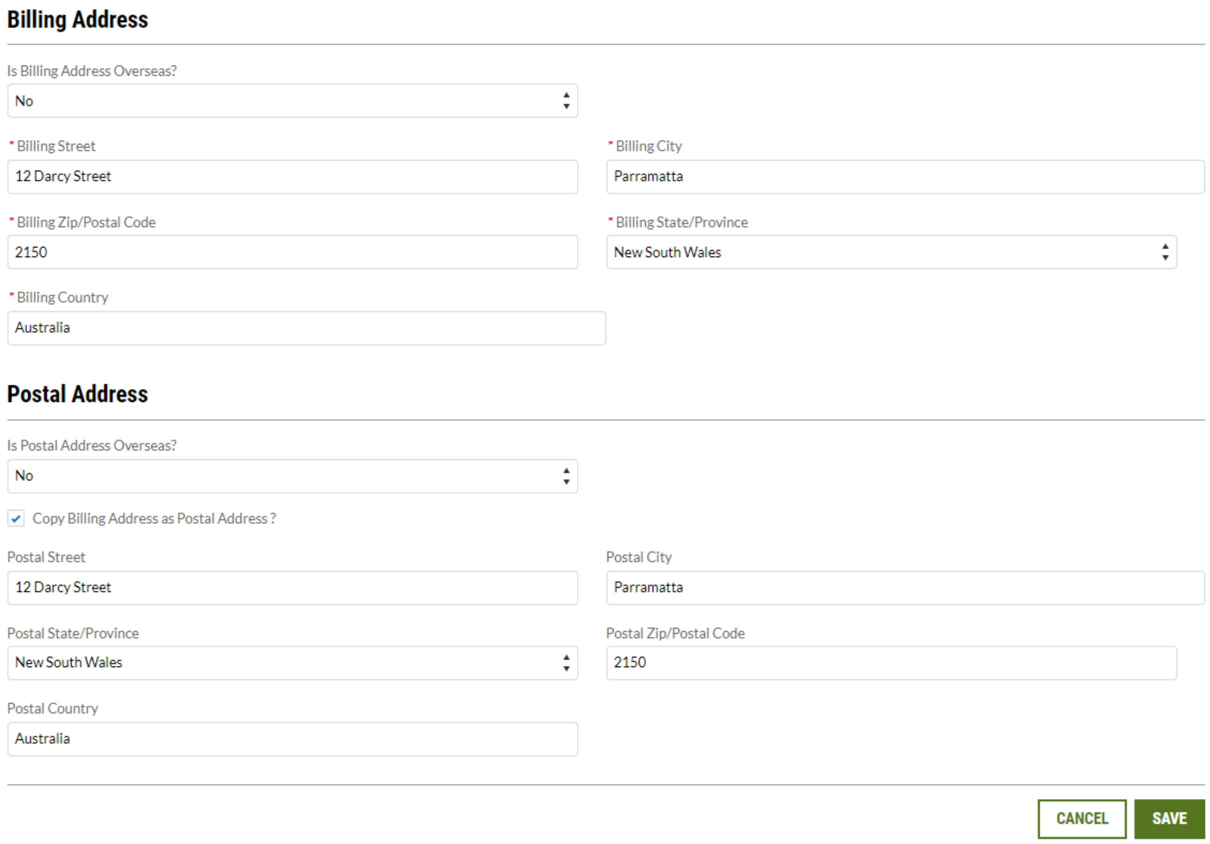


Figure 6 **Example of a person account creation page – addresses**

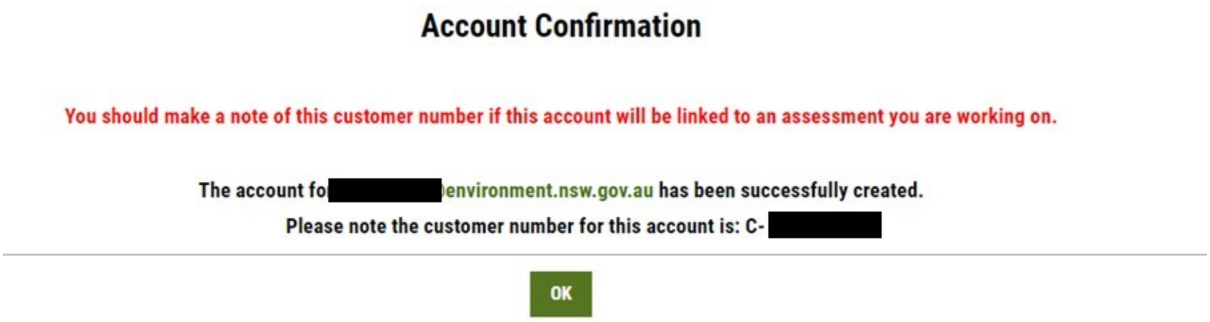


Figure 7 **Confirmation screen for account creation – person account**

The person the account was created for will receive an email containing the customer number (C-XXXXXX) (Figure 8). This email will come from the email address no-reply@admin.lmbc.nsw.gov.au with a subject line of 'Sandbox: Account successfully created'.

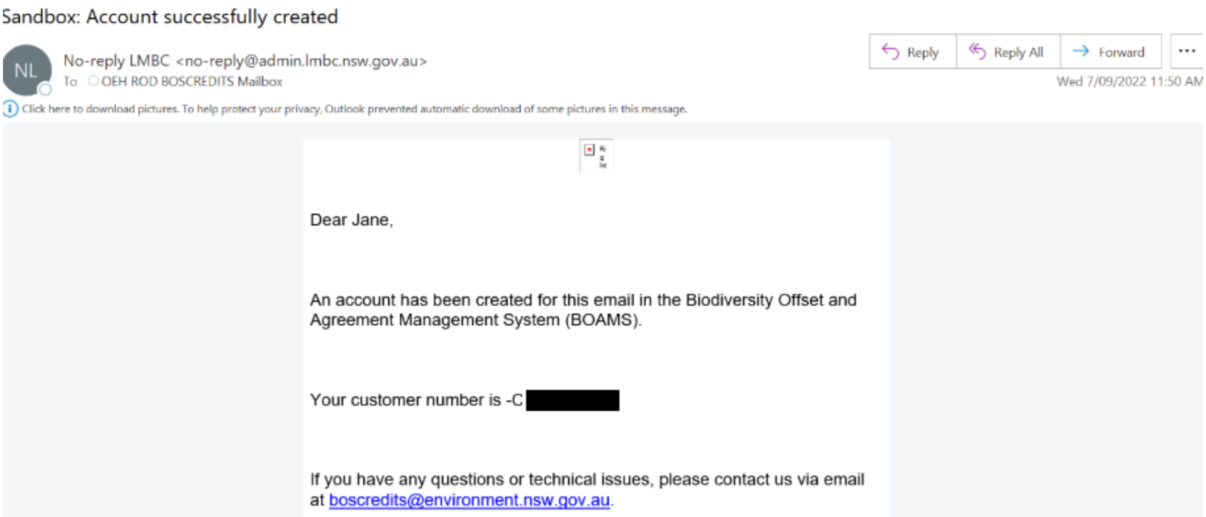


Figure 8 **Email received when a person account is created**

Creating an organisation (business) account

Use the ‘New Business Account’ button to create an account for an organisation.

When creating a business account, an identifying business number will need to be added in the first step. This could be an Australian Company Number (ACN) (9-digit identifier issued by the Australian Securities and Investments Commission (ASIC)), an Australian Business Number (ABN) (11-digit identifier), an Australian Registered Body Number (ARBN) (9-digit number allocated by ASIC when a body is registered with them other than as a company, or a foreign company), and other (for example – MRSN).

Using an ACN

When using an ACN as an identifying business number, type in the ‘ASIC ACN’ field and click on ‘ACN Check’ (Figure 9).

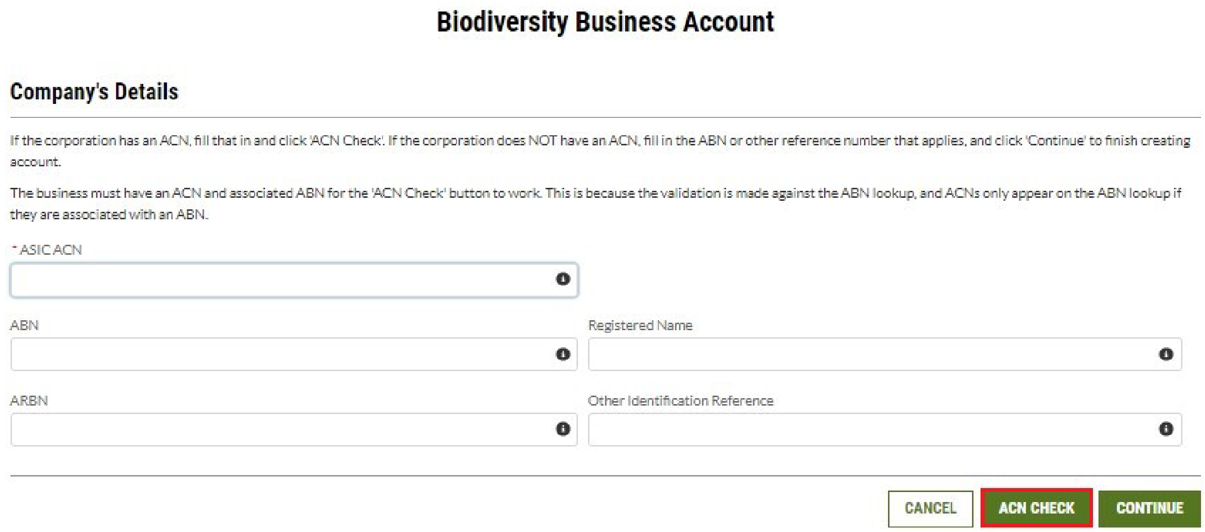


Figure 9 **ACN check in BOAMS**

If the company is registered on ASIC, clicking the ‘ACN Check’ button will populate the ‘ABN’ and ‘Registered Name’ fields using information from ASIC. The business must have an ACN and associated ABN for the ‘ACN Check’ button to work. This is because the validation is made against the ABN lookup, and ACNs only appear on the ABN lookup if they are associated with an ABN.

Once completed, click ‘Continue’.

Using any other business identifying number

If the organisation does not have an ACN, fill in the ABN or other reference number that applies, and click ‘Continue’ to finish creating the account. When using a business identifying number that isn’t an ACN, fill in the registered business name and ABN/ARBN/Other and click ‘Continue’ (Figure 10).

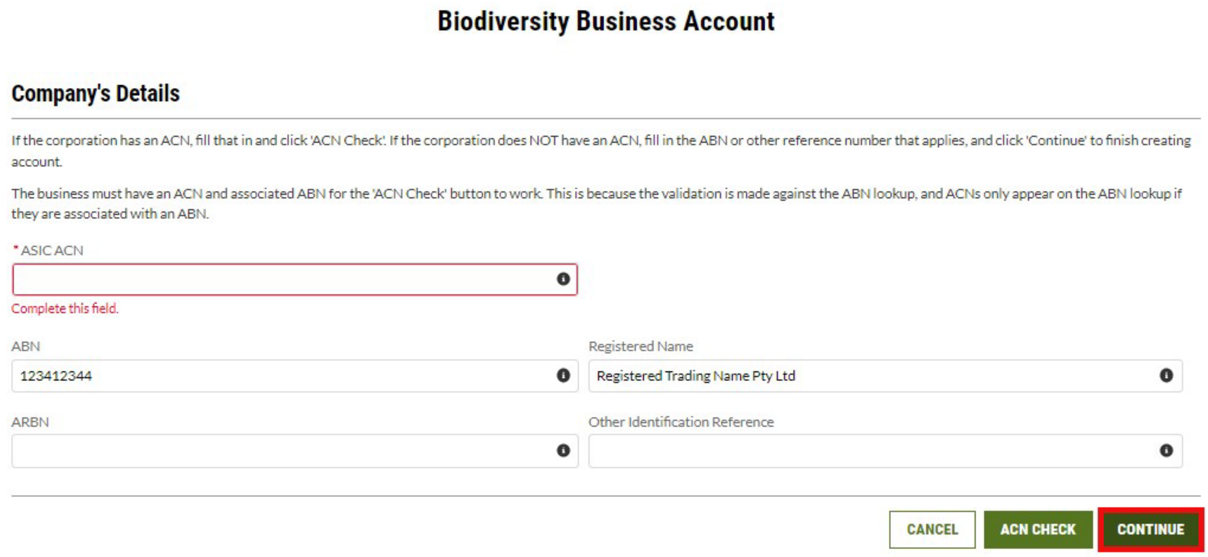


Figure 10 **Example of how to fill out details using an ABN or other reference number**

The postcode and country will be automatically populated when the ACN check is applied. You will need to enter any business address details that do not automatically populate.

Registered address – all mandatory fields for the registered business address as it appears on the company extract.

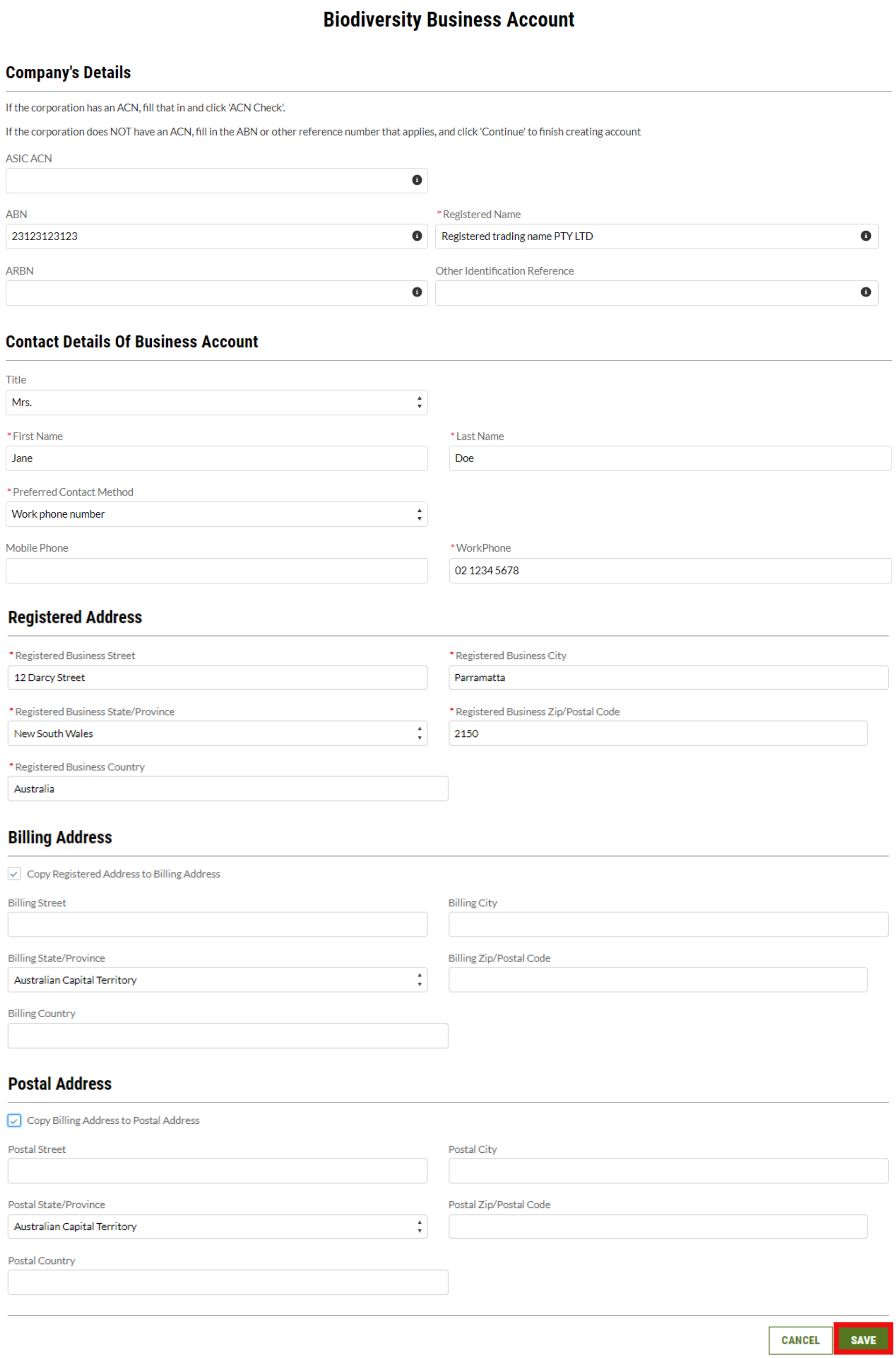
Billing address – all mandatory fields for the billing address.

Postal address – all mandatory fields for the postal address as it appears on the company extract.

When creating a business account:

- use the full legal name as it appears on the land title documentation or on ASIC company records
- do not use a shortened business name
- do not use a variation of the business name as this may be another company
- a contact person for the business must be identified. All mandatory fields (marked *) for the contact details of that person must be completed, including a unique email address. Enter their full legal name as it appears on the company extract or other formal business document.

Note: Information in some of the examples below has been redacted to protect privacy. Once all information has been completed select ‘Save’ (Figure 11).



Biodiversity Business Account

Company's Details

If the corporation has an ACN, fill that in and click 'ACN Check'.

If the corporation does NOT have an ACN, fill in the ABN or other reference number that applies, and click 'Continue' to finish creating account

ASIC ACN

ABN: 23123123123

* Registered Name: Registered trading name PTY LTD

ARBN

Other Identification Reference

Contact Details Of Business Account

Title: Mrs.

* First Name: Jane

* Last Name: Doe

* Preferred Contact Method: Work phone number

Mobile Phone

* WorkPhone: 02 1234 5678

Registered Address

* Registered Business Street: 12 Darcy Street

* Registered Business City: Parramatta

* Registered Business State/Province: New South Wales

* Registered Business Zip/Postal Code: 2150

* Registered Business Country: Australia

Billing Address

Copy Registered Address to Billing Address

Billing Street

Billing City

Billing State/Province: Australian Capital Territory

Billing Zip/Postal Code

Billing Country

Postal Address

Copy Billing Address to Postal Address

Postal Street

Postal City

Postal State/Province: Australian Capital Territory

Postal Zip/Postal Code

Postal Country

CANCEL SAVE

Figure 11 Example of information needed when creating a business account

If an account already exists for the business, an error message will appear (Figure 12). In this case, the customer should provide their customer number or contact the BOS Credits mailbox for assistance.

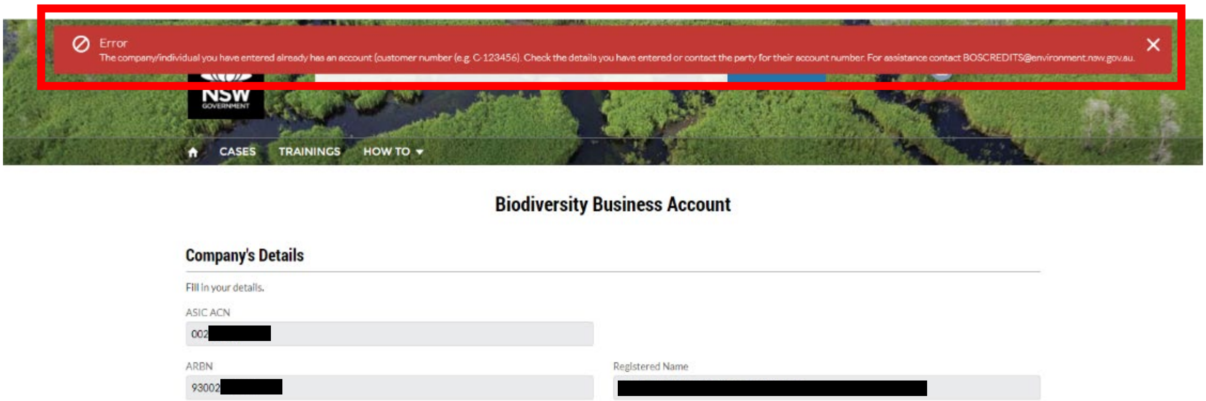


Figure 12 **Error message if you create an account with details that already exist**

When the new business account is successfully created, a confirmation screen will appear (Figure 13). This advises that accounts have been successfully created for the business as well as its contact person and gives their customer numbers. Record these customer numbers for future use. Click 'OK' to return to landing page.

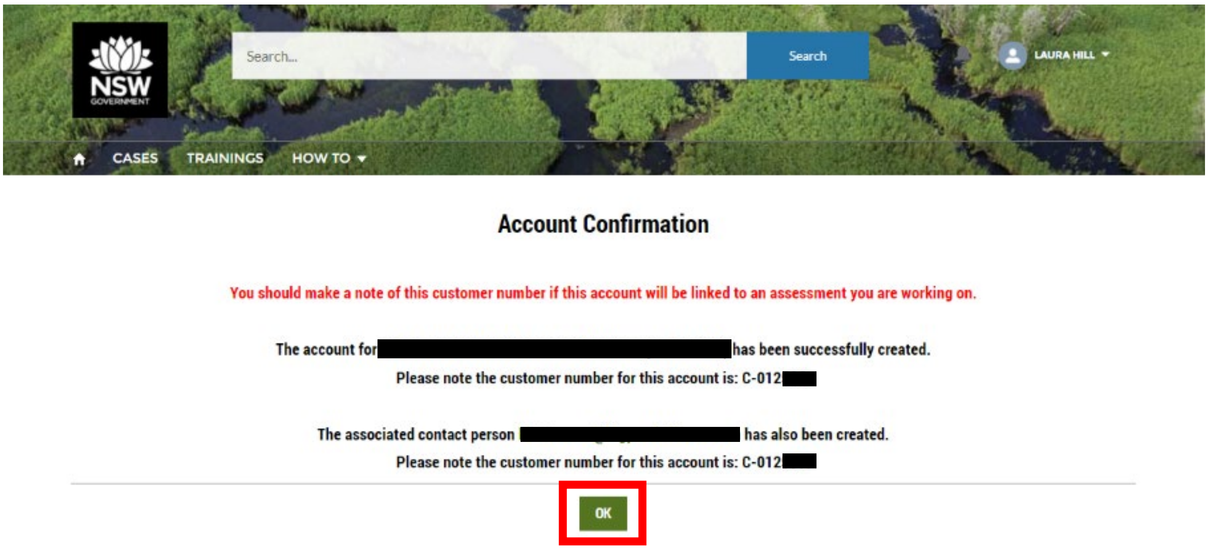
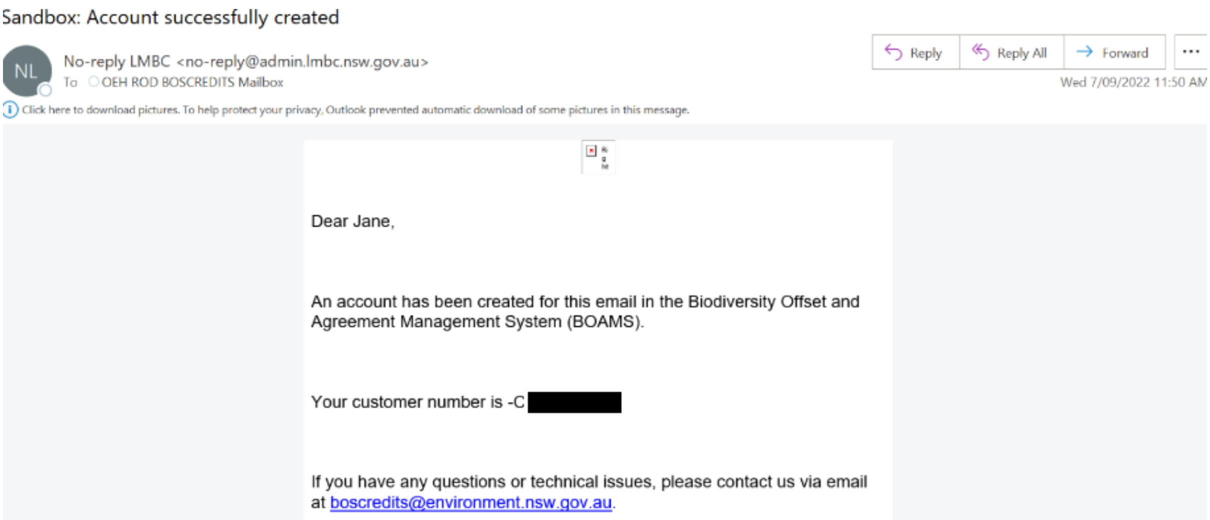


Figure 13 **Confirmation screen for account creation – business account**

The contact person for the business account will also receive an email containing the customer number (C-XXXXXX) (Figure 14). This email will come from the email address no-reply@admin.lmbc.nsw.gov.au with a subject line of 'Account successfully created'.



Sandbox: Account successfully created

No-reply LMBC <no-reply@admin.lmbc.nsw.gov.au>
To OEH ROD BOSCREDITS Mailbox

Reply | Reply All | Forward | ...

Wed 7/09/2022 11:50 AM

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear Jane,

An account has been created for this email in the Biodiversity Offset and Agreement Management System (BOAMS).

Your customer number is -C[redacted]

If you have any questions or technical issues, please contact us via email at boscredits@environment.nsw.gov.au.

Figure 14 **Email received when a business account is created**

Assessment cases

There are 2 types of assessment case that can be created within BOAMS by assessors. These are development/clearing cases and stewardship cases.

Development/clearing cases

A development/clearing case issued where the BAM is being applied to:

- local development (assessed under Part 4 of the *Environmental Planning and Assessment Act 1979* (EP&A Act)) that triggers the scheme threshold or is likely to significantly affect threatened species based on the test of significance in section 7.3 of the BC Act
- state significant development and state significant infrastructure projects, unless the Secretary of the department and the environment agency head determine that the project is not likely to have a significant impact
- an activity that requires approval under Part 5, Division 5.1 of the EP&A Act (where the proponent has opted-in to the scheme)
- development that requires approval under Part 5, Division 5.2 of the EP&A Act
- biodiversity certification proposals (see 'More information')
- clearing of native vegetation in urban areas and areas zoned for environmental conservation that exceeds the scheme threshold and does not require development consent
- clearing of native vegetation that requires approval by the Native Vegetation Panel under the *Local Land Services Act 2013* (see 'More information').

BSA stewardship cases

A stewardship case is used where the BAM is being applied to land in the case of an application for a BSA under the BC Act.

BOAMS case data

When entering data into BOAMS, please follow the instructions below to ensure consistency within accounts.

Note: All mandatory fields in BOAMS are marked with a red asterisk *.

When creating accounts, to ensure consistency and assist reviewers, data entered in BOAMS should meet the following standards:

- full legal names used, including middle name
- a unique email address used for each account
- phone numbers entered as a 10-digit number
- address entered as it appears on a proof of identity or an ASIC company extract.

For a parent case, property information is required for the case to be finalised and submitted. Data entered about property as part of a development or stewardship assessment should meet certain standards.

An example of property information required is outlined in Table 3.

Table 3 Property information required for BOAMS

Field	Data required	Example
Street	Street number and street name in text	1 George Street
City	City name in text	Sydney
State	State name or abbreviation in text	NSW, New South Wales
Postcode	4-digit postcode	2000
LGA	Search for the relevant local council name where property is located by starting to type the council name. Select the council from the list once it appears	Council of the City of Sydney

Data entered about the Lot/DP or other land title or any other land title reference as part of a development or stewardship assessment case should also meet certain standards (Table 4).

Property information such as lot/DP or other title reference will need to be entered twice for a stewardship case – once in the assessment case and once in the application case.

Table 4 Property information data entry standards

Field	Data required	Example
Lot	Single lot number	1
Hectare	Hectare area of proposed site	10 ha
Plan number	Single plan number associated with the lot	45678
Section	Single section number associated with a Lot/DP. Section number will only sometimes be relevant	23
Registered deed number	Unique book reference and number reference written as 'Book [number ref] no. [number ref]'	Book 12 no. 1234
Folio identifier or volume-folio	Volume number – folio number	Volume no. 1234 on folio no. 12 would be entered as 1234-12

Creating a development/vegetation clearing assessment case

Follow the steps below to create a development/vegetation clearing assessment case.

1. From the BOAMS landing page, select the 'New development/clearing assessment' button on the right (Figure 15).

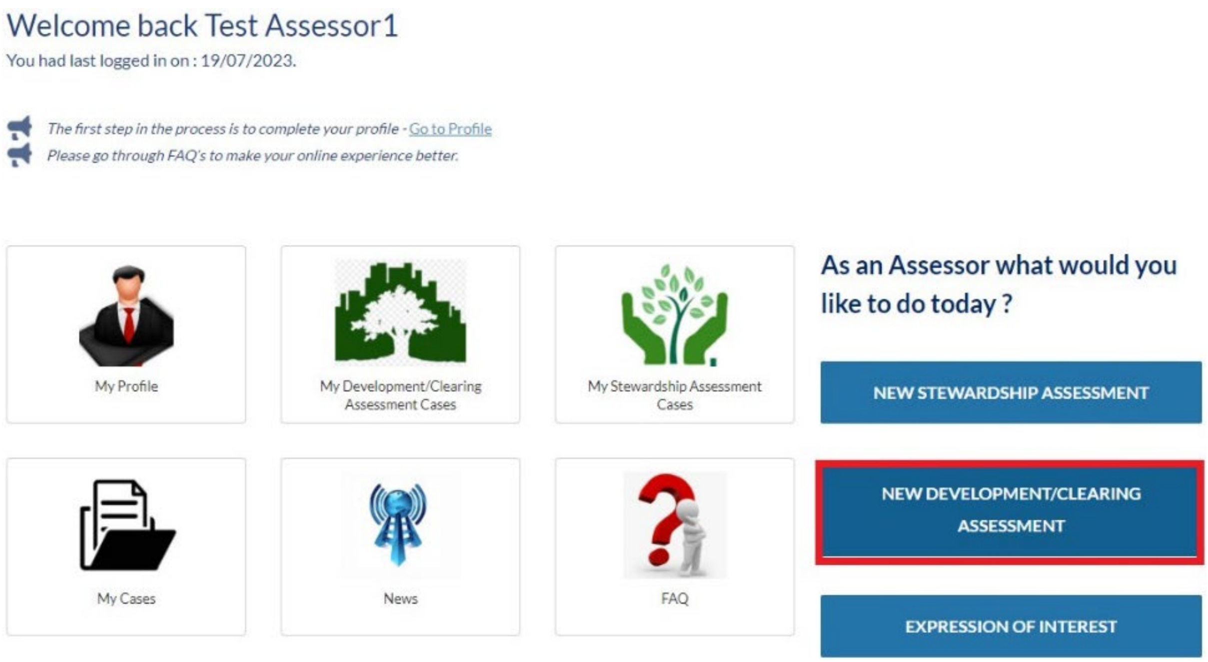


Figure 15 'New Development/Clearing Assessment' button on the BOAMS landing page

2. Enter the subject for the development case. This field is mandatory. You can also add a description of the development/clearing assessment, although this field is optional. Once completed, click 'Confirm' (Figure 16).

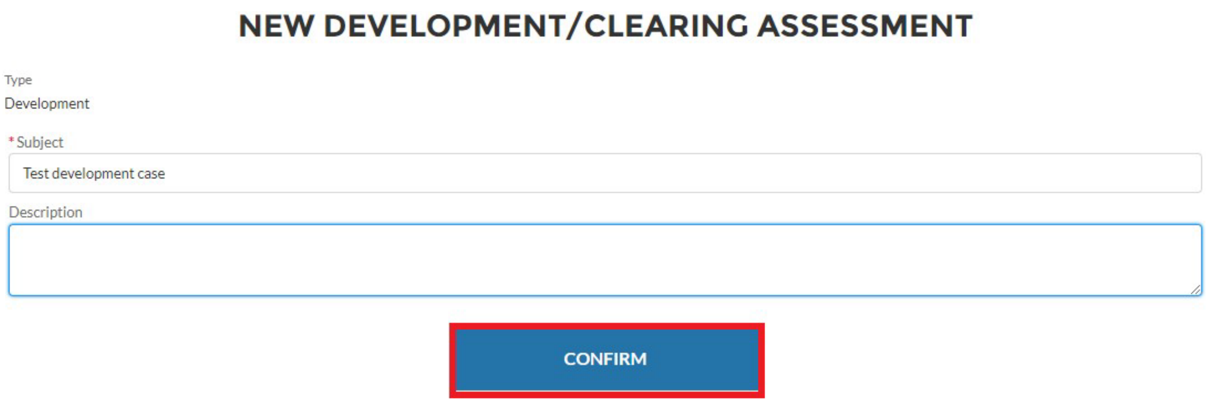


Figure 16 'Subject' and 'Description' fields for a development/clearing case

3. The development case page will open (Figure 17).
4. Link case parties to the case by clicking 'New' on the 'Case Parties' tab (Figure 17). Select the relevant record type in the 'New Case Party' dialog box for the case party being added, then click 'Next' (Figure 18).

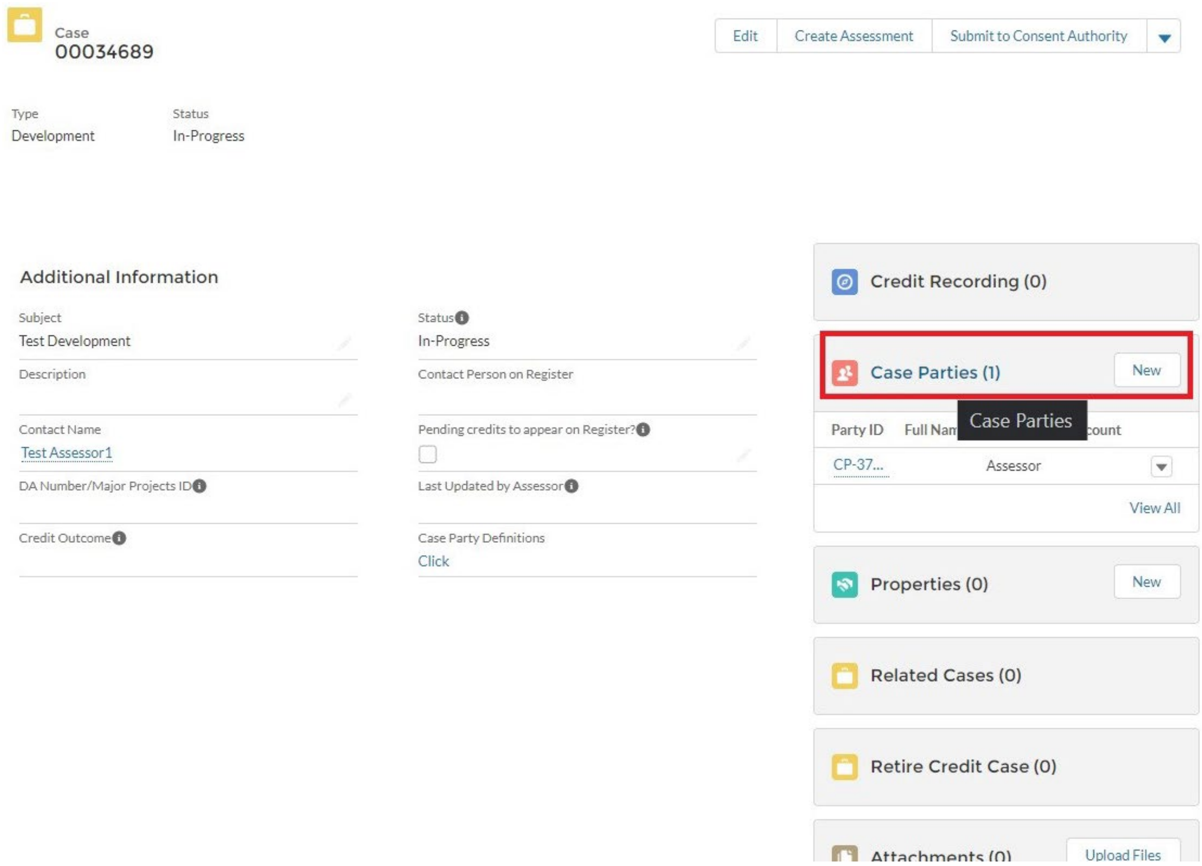


Figure 17 Development/clearing case page

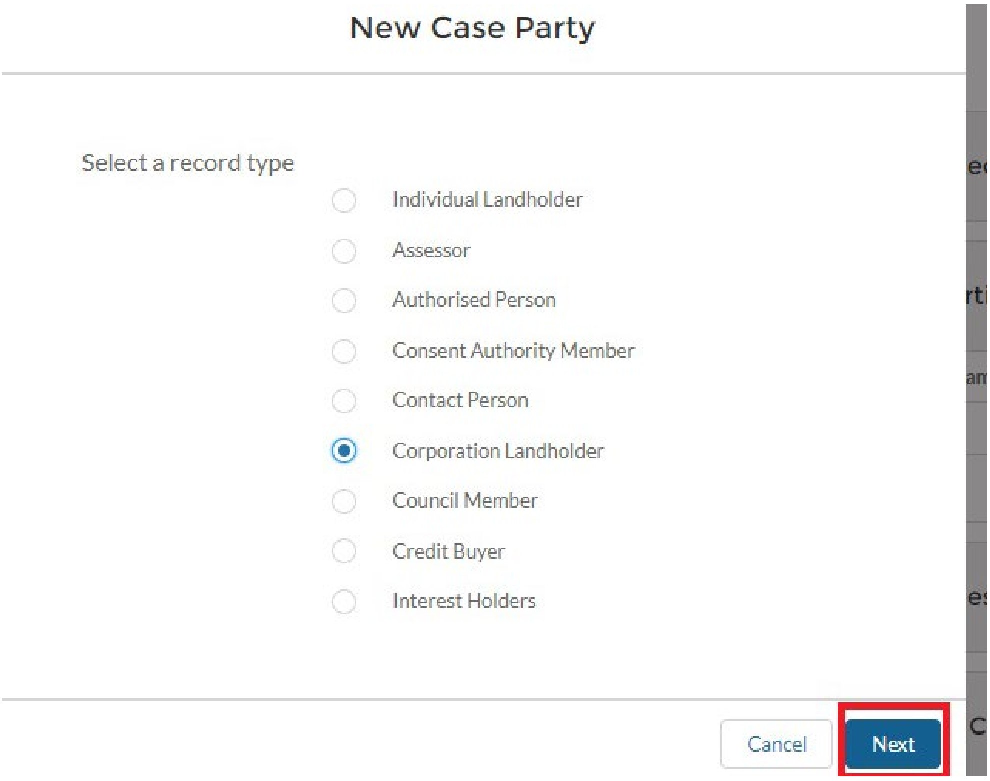


Figure 18 Selecting the type of case party – development/clearing case

There are a number of case party types in BOAMS and the case party type defines the role of the person/business on a particular case. See the section 'Adding case parties to assessment cases' for further details.

At a minimum, an individual or corporation landholder will need to be added to a development/clearing case.

If a corporation landholder is added, authorised representative case parties for the persons that are legally authorised to act on behalf of that corporation will also be required (e.g. directors). A contact person case party may be required if neither the landholder, authorised person nor assessor is going to be the contact.

Remember, an account must be created for the person or business before they can be added to a case as a case party.

5. Enter the required information to link the case party (Figure 19). Table 6 sets out the information required according to case party types relevant to development/clearing cases. Click 'Save' to create and save the new case party. Repeat these steps for each case party required.

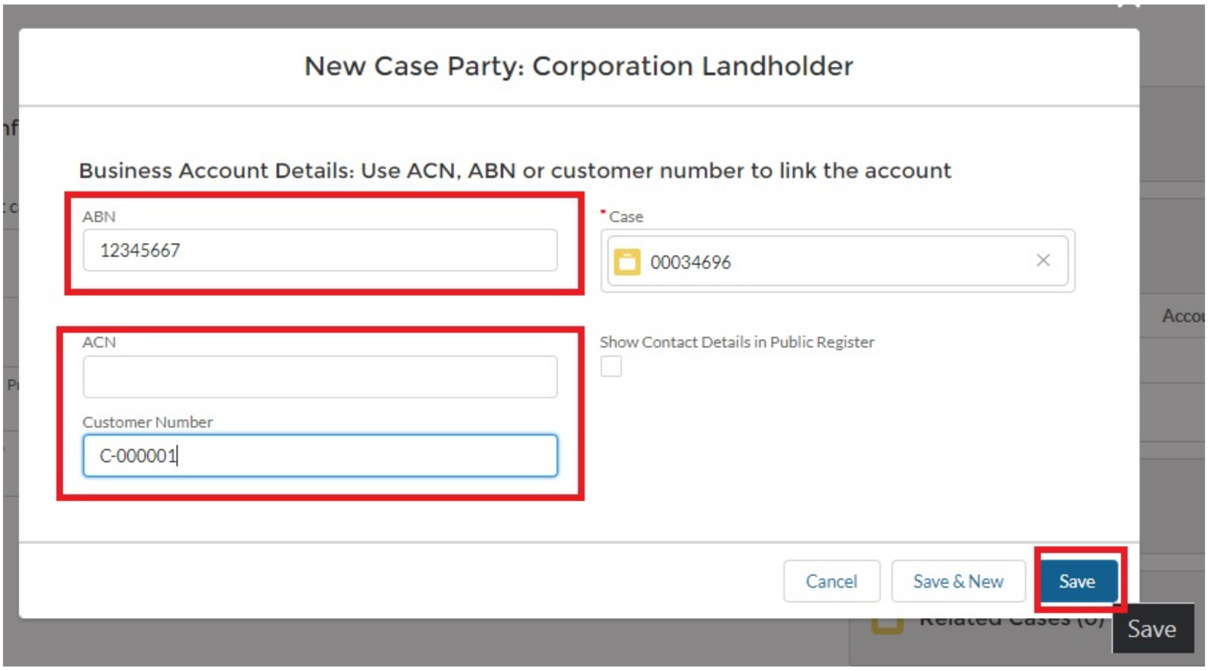


Figure 19 Example of a corporation landholder new case party page

6. Next, add property information for the development case by clicking ‘New’ on the ‘Properties’ tab (Figure 20). Enter all the required information and save (Figure 21).

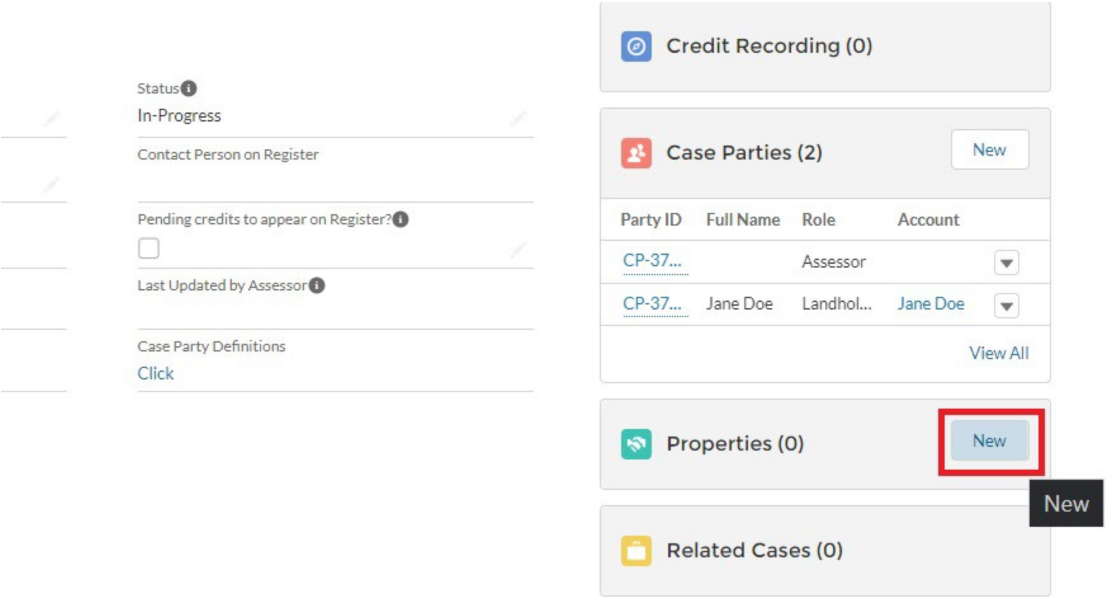


Figure 20 ‘New’ button on the ‘Properties’ tab

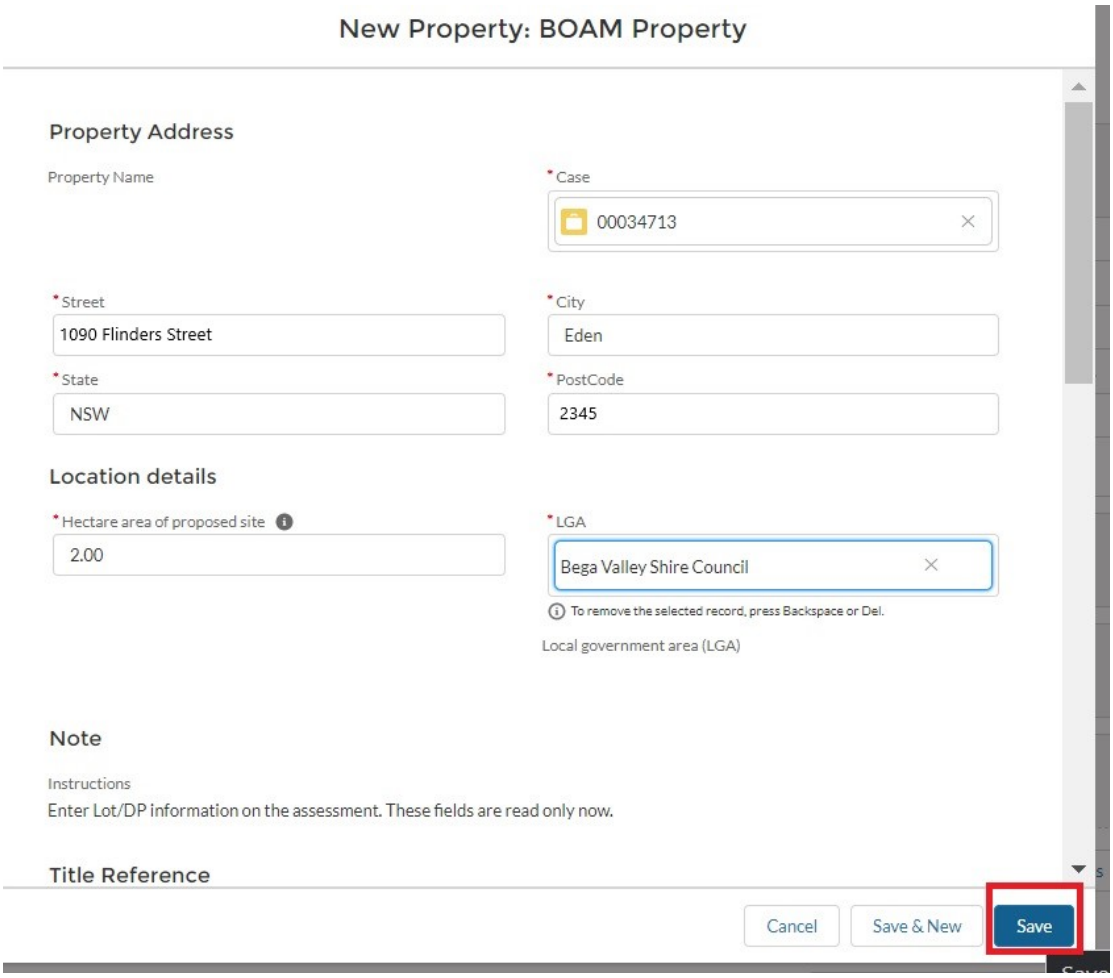


Figure 21 Example details for a property being added

7. The next step is to create an assessment. To do this, click on the ‘Create Assessment’ button at the top right of the case page (Figure 22).

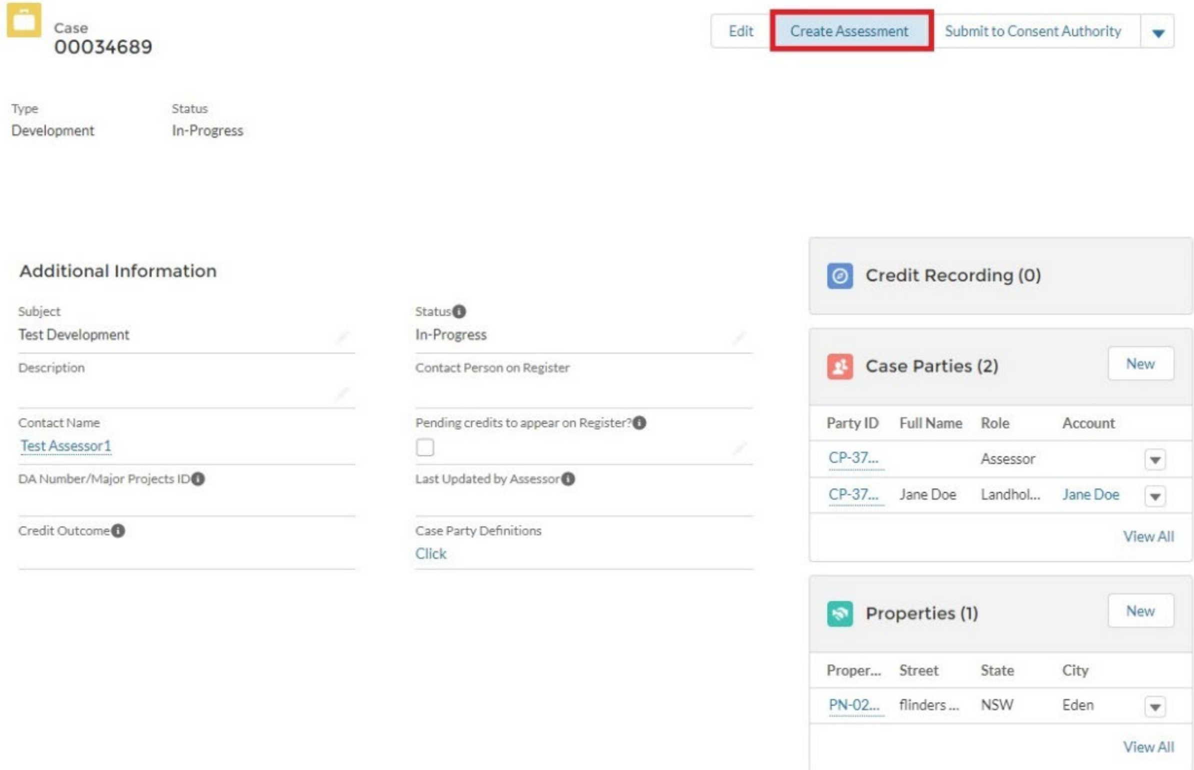


Figure 22 ‘Create Assessment’ button on the case page

8. Add property information to the assessment by clicking ‘New’ on the ‘Lot/DPs’ tab (Figure 23) and completing all required information (Figure 24). Help text is provided for filling out this section.

Figure 23 Adding lot and DP location information

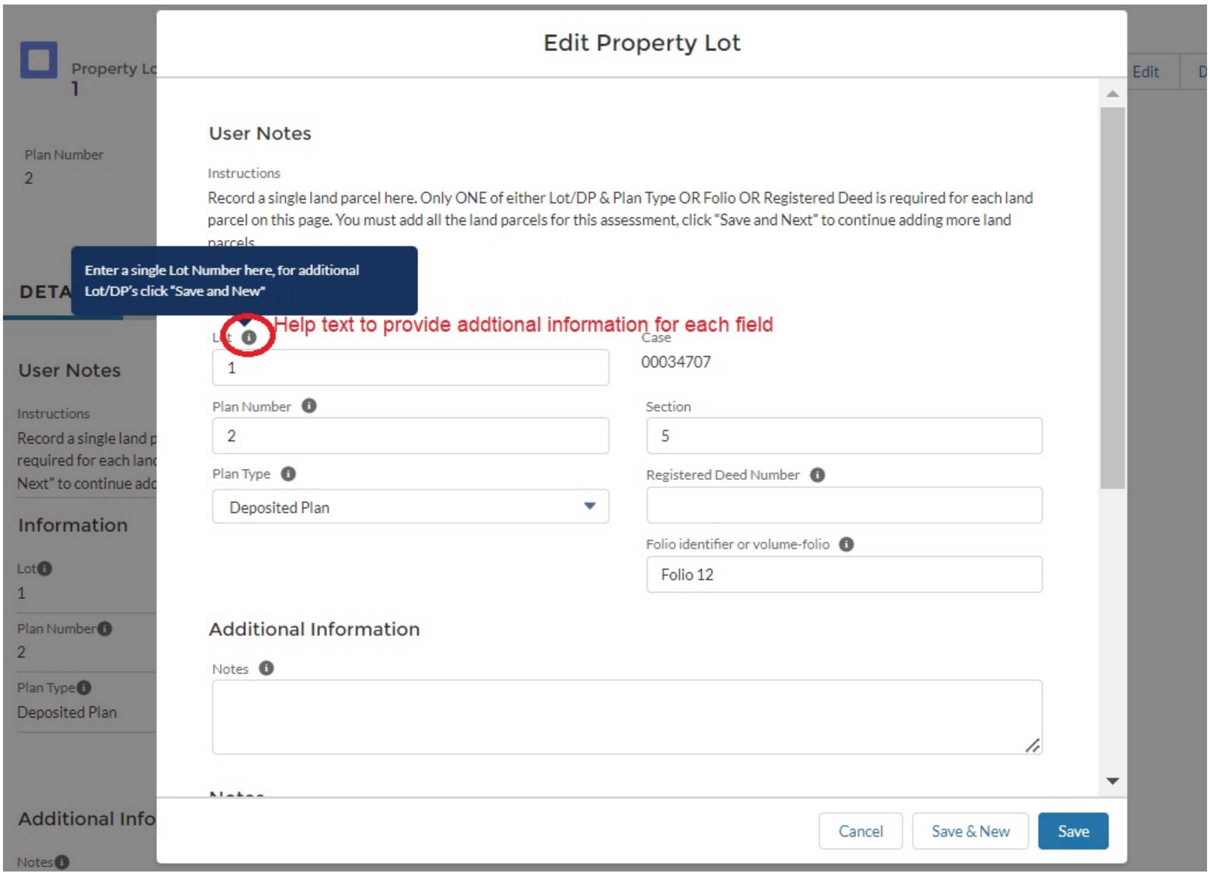


Figure 24 Help text pop-up for inputting lot and DP information

9. The next step in creating a development case is applying the BAM to the site via the BAM-C. For information on how to use the BAM-C, please use the *Biodiversity Assessment Method (BAM) Calculator User Guide*.
10. Once the BAM-C assessment is finalised, refresh the case to ensure the credit obligation has populated on the case.
11. Click 'Submit to Consent Authority' within BOAMS (Figure 25). This enables a registered consent authority or council member case party to view the BOAMS case information.

Please refer to the earlier section on case parties for guidance on adding consent authority or council member case parties.

As well as submitting the assessment in BOAMS, the application for the proposal must be lodged with the consent authority.

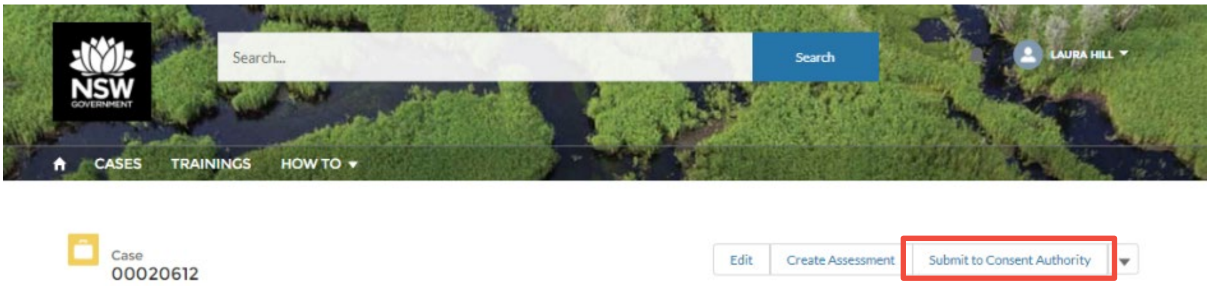


Figure 25 'Submit to Consent Authority' button

Creating a stewardship case (as part of an application for a BSA)

Follow the steps below to create a stewardship case.

12. From the BOAMS landing page, select 'New Stewardship Assessment' on the right (Figure 26).

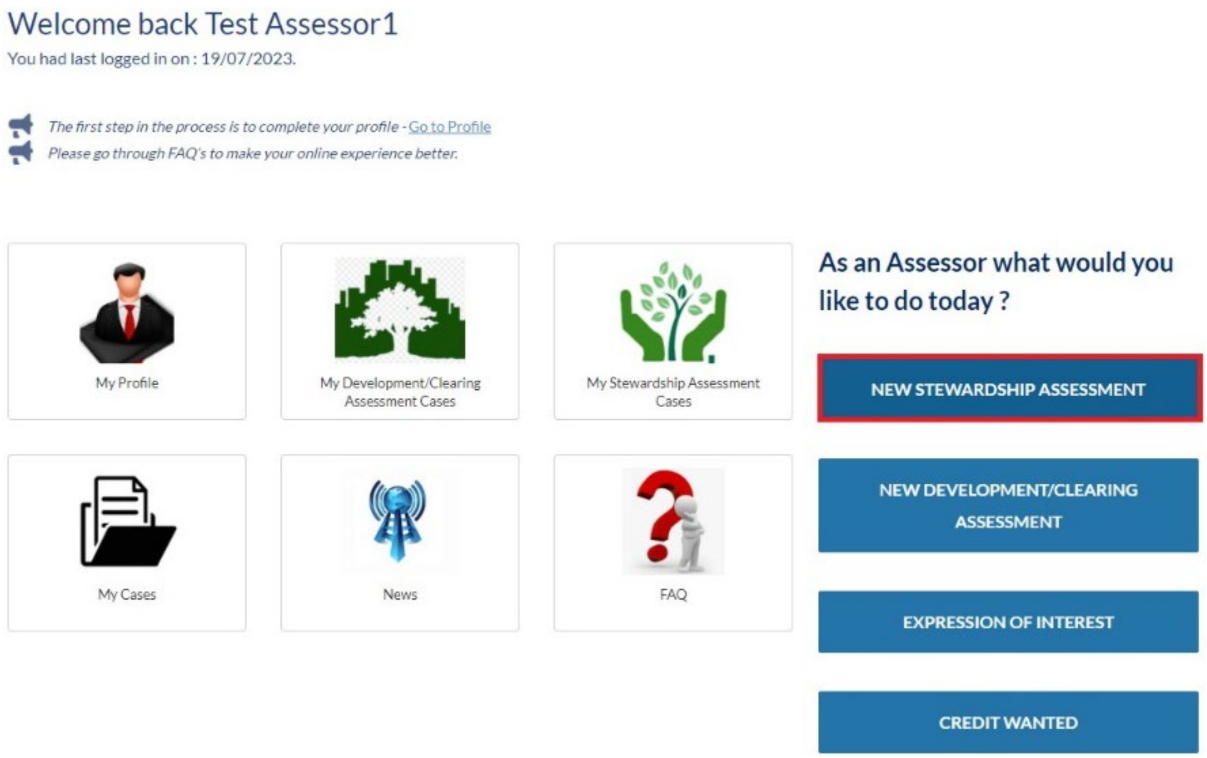


Figure 26 'New Stewardship Assessment' button on the BOAMS landing page

13. Enter the subject for the stewardship case. This field is mandatory. You can also add a description of the stewardship assessment, although this field is optional. Once completed, click 'Confirm' (Figure 27).

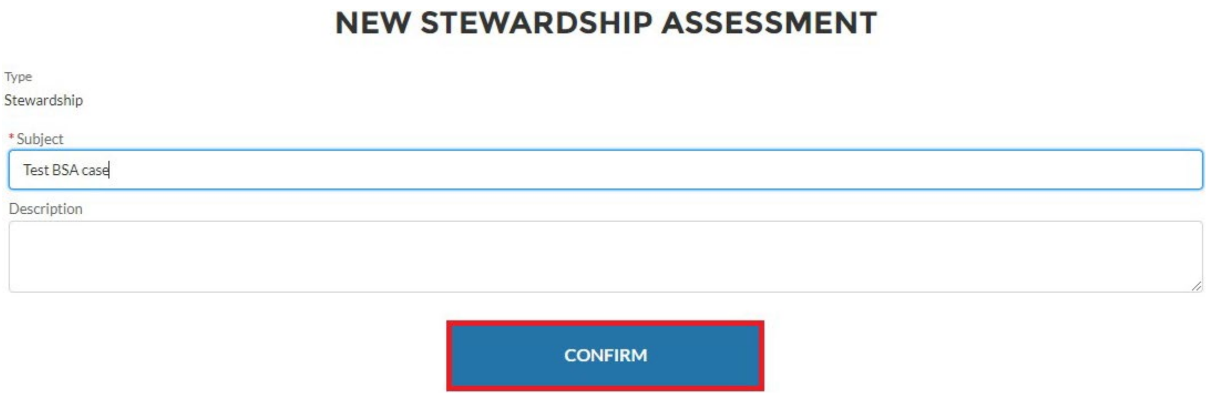


Figure 27 'Subject' and 'Description' fields for a stewardship case

14. The stewardship case page will open. To add case parties to the stewardship case, click 'New' on the 'Case Parties' tab (Figure 28).

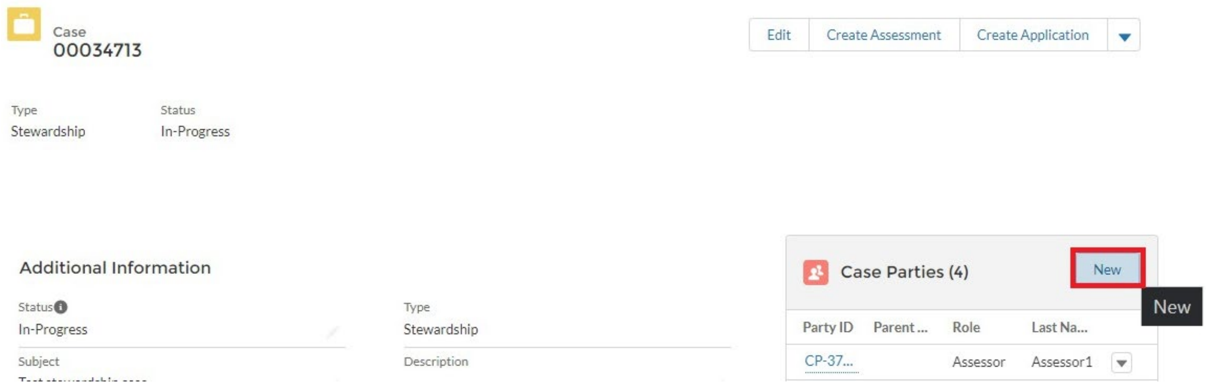


Figure 28 First page associated with creating a stewardship case

15. Select and create case parties for the relevant record types (Figure 29). For stewardship cases, landholders and contact person case parties need to be added to the case. See 'Adding case parties to assessment cases' for further details.

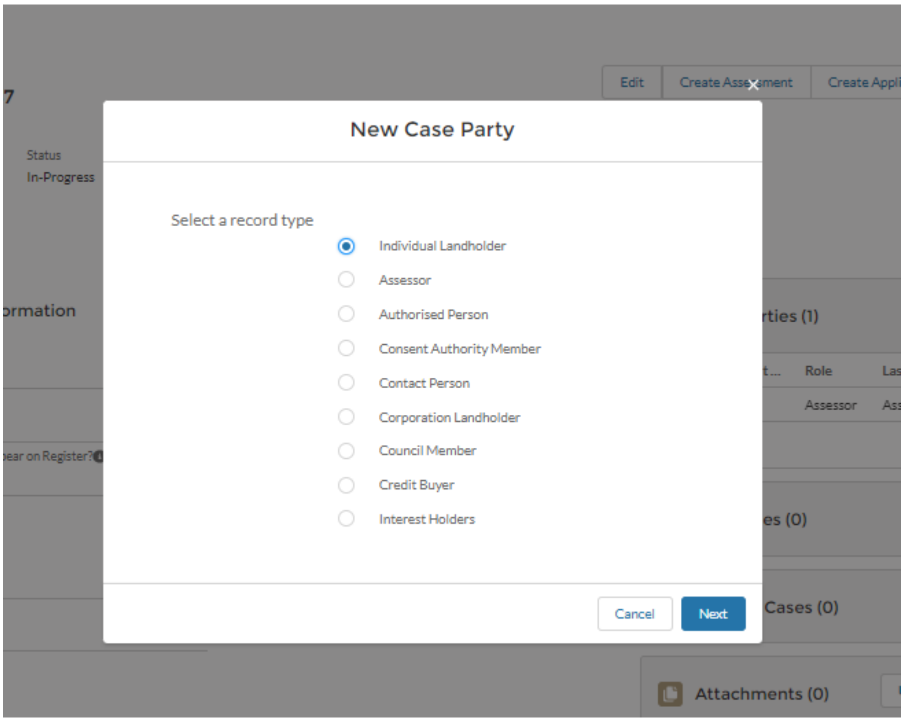


Figure 29 Selecting the type of case party – stewardship case

There are a number of case party types in BOAMS and the case party type defines the role of the person/business on a particular case.

At a minimum, an individual or corporation landholder and a contact person will need to be added to a stewardship case.

If a corporation landholder is added, authorised representative case parties for the persons that are legally authorised to act on behalf of that corporation will also be required (e.g. directors). A contact person case party may be required if neither the landholder, authorised person nor assessor is going to be the contact.

Remember, an account must be created for the person or business before they can be added to a case as a case party.

16. Enter required information to link the case party (Figure 30). Table 6 sets out the information required according to case party types relevant to stewardship cases. Click 'Save' to create and save the new case party. Repeat these steps for each case party required.

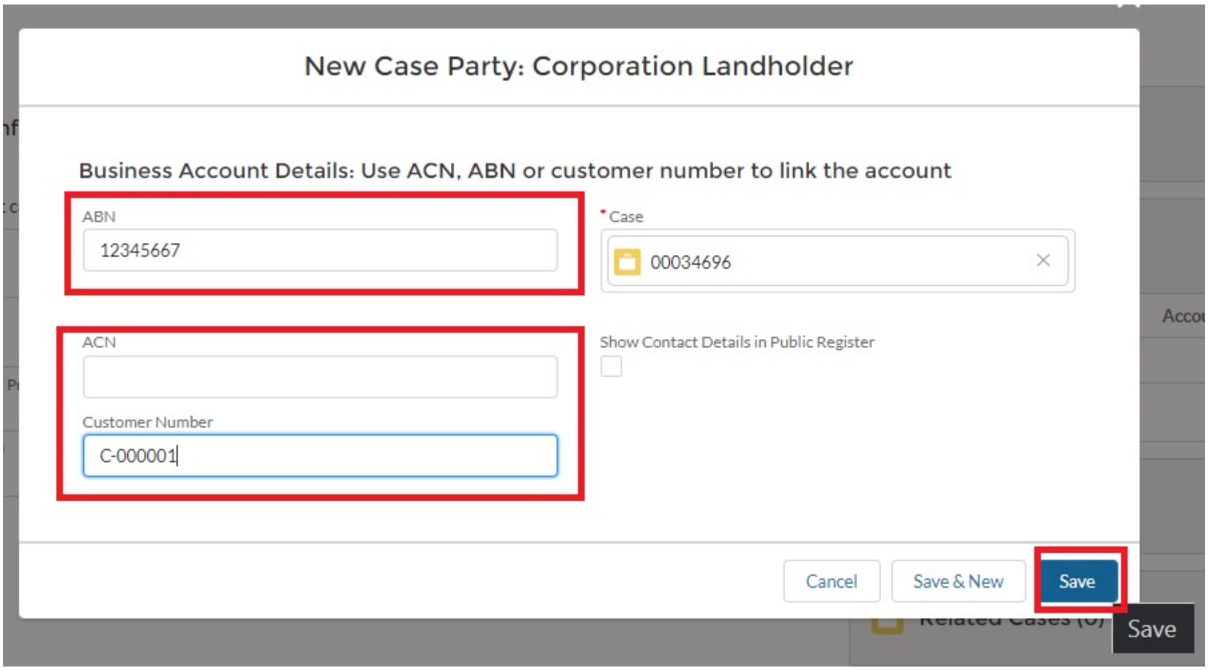


Figure 30 **Example of a corporation landholder new case party page**

17. Next, add property information for the stewardship case by clicking 'New' on the 'Properties' tab (Figure 31). Enter all the required information and save (Figure 32).

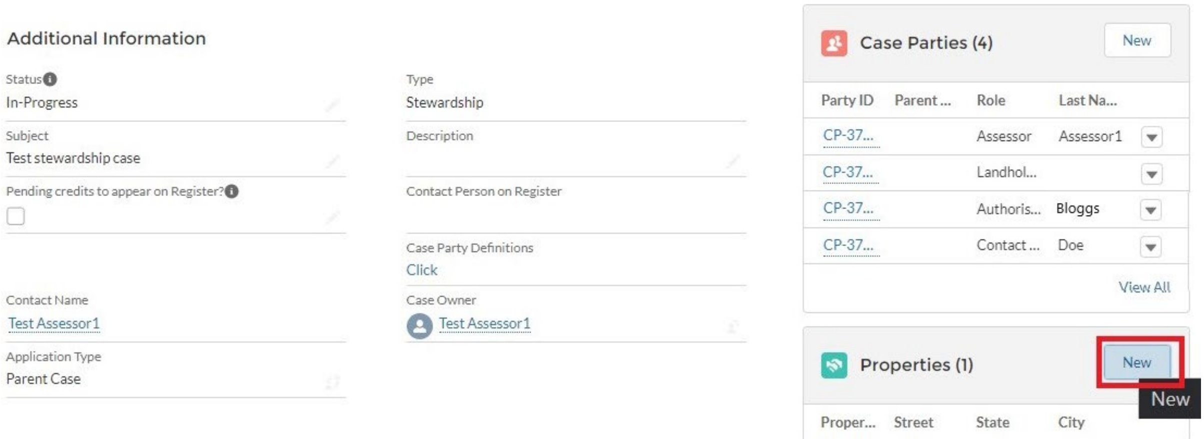


Figure 31 **'New' button on the 'Properties' tab**

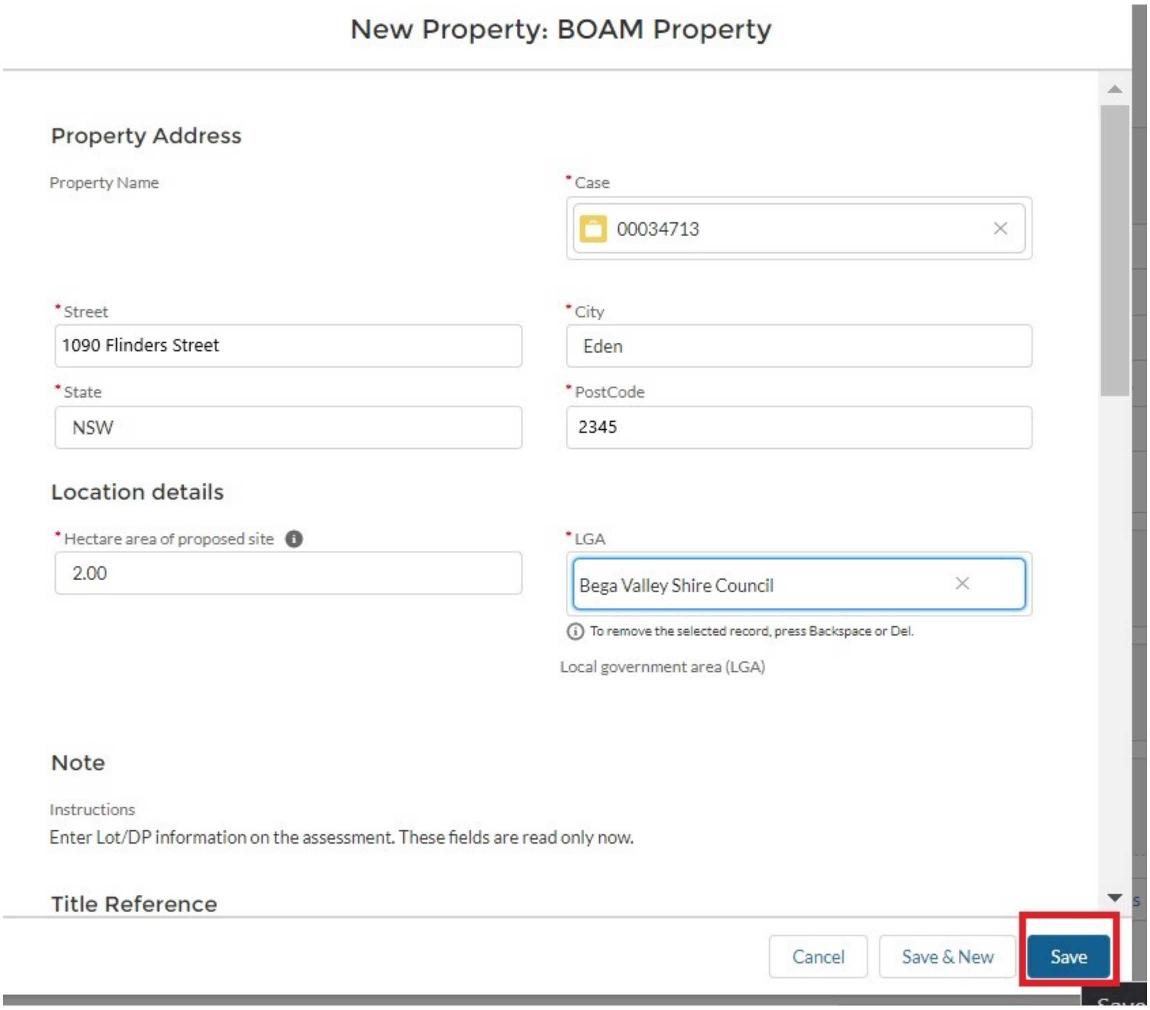


Figure 32 **Example details for a property being added**

18. The next step is creating an assessment. Click 'Create Assessment' at the top right of the case page. The prompt in Figure 33 will come up – continue by clicking 'Create Assessment'.

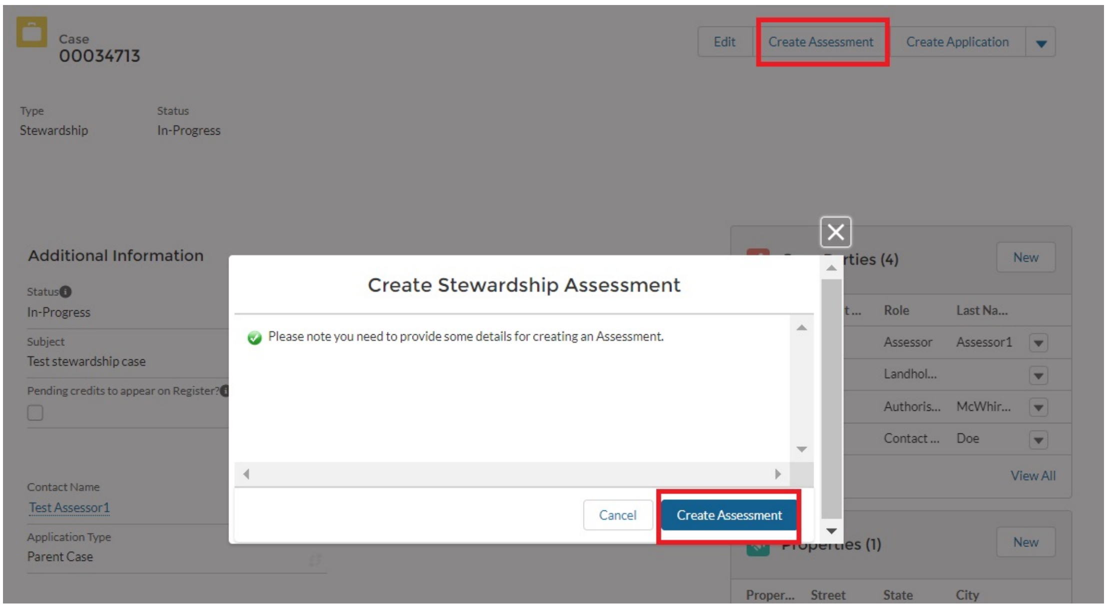


Figure 33 **Creating an assessment for a stewardship case**

19. Add property information to the assessment by clicking ‘New’ on the ‘Lot/DPs’ tab (Figure 34) and completing all required information (Figure 35). Help text is provided for filling out this section.

Figure 34 Adding lot and DP location information

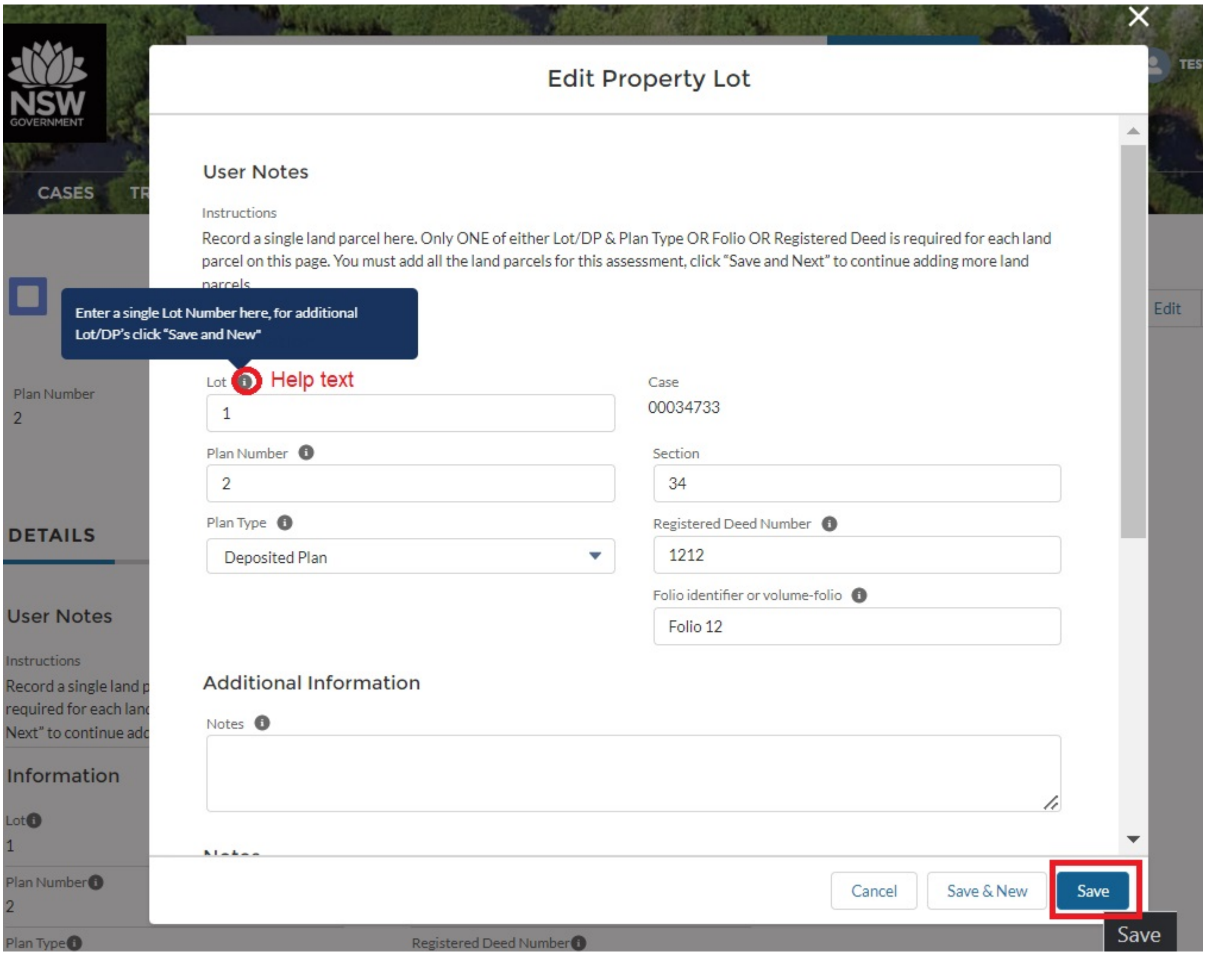


Figure 35 Help text pop-up for inputting lot and DP information

20. The next step in creating a stewardship case is applying the BAM to the site via the BAM-C and attaching all additional documentation required for the BSA case. For information on how to use the BAM-C, please use the *Biodiversity Assessment Method (BAM) Calculator User Guide*.
21. Once you have completed the BAM-C assessment, you will need to create an application, which can be done by clicking the ‘Create Application’ button (Figure 36).

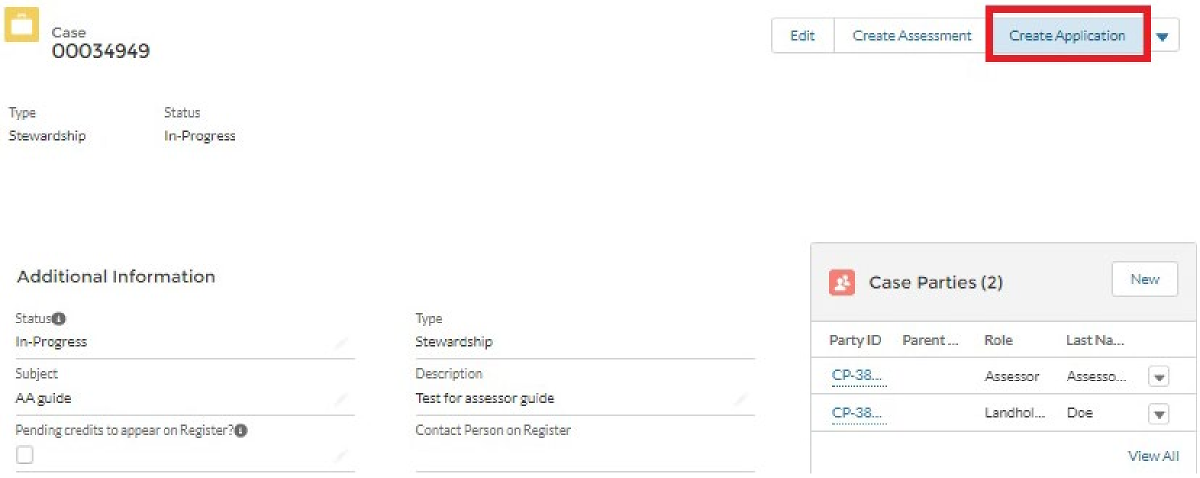


Figure 36 **'Create Application' button**

22. Fill in the all the required information (Figure 37). There is help text available to aid in filling out this section accurately. Click 'Save'. You can edit this section if required before submitting the application.

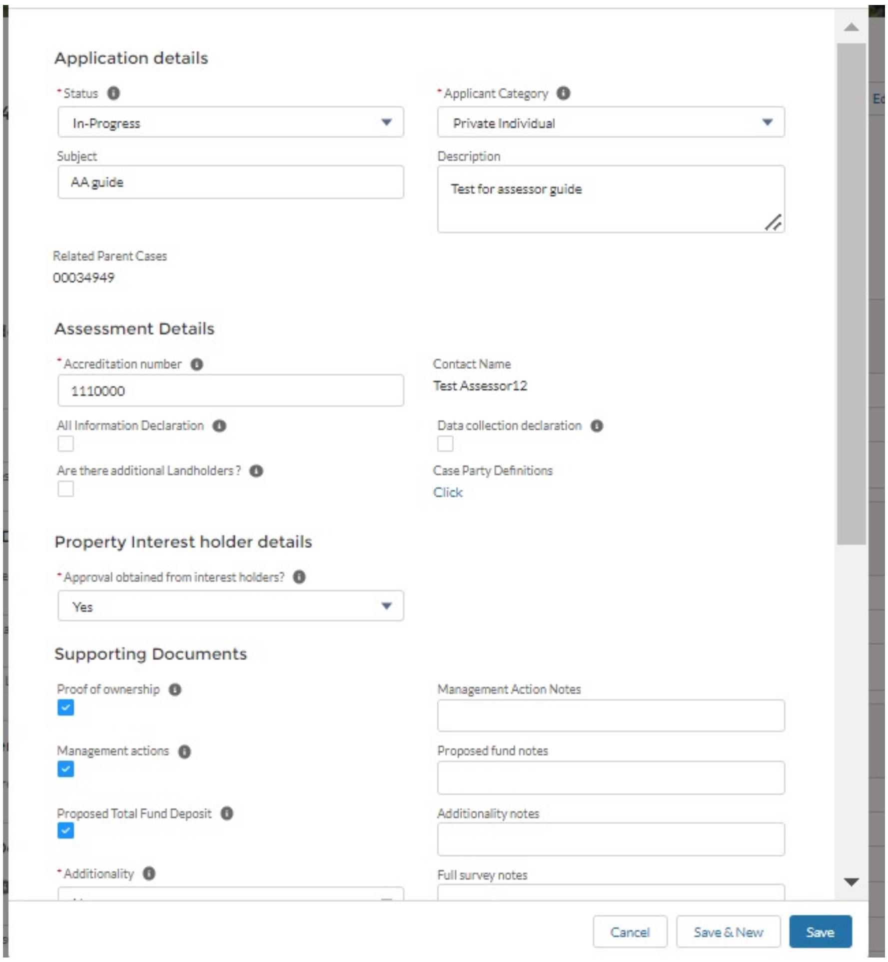


Figure 37 **Example application details**

23. Once the BAM-C assessment and application is finalised, navigate to the application through the 'Related Cases' tab on the right of the case page (Figure 38). Click 'Submit' (Figure 39). This enables the Taskforce to view the BOAMS case information and progress the stewardship application.

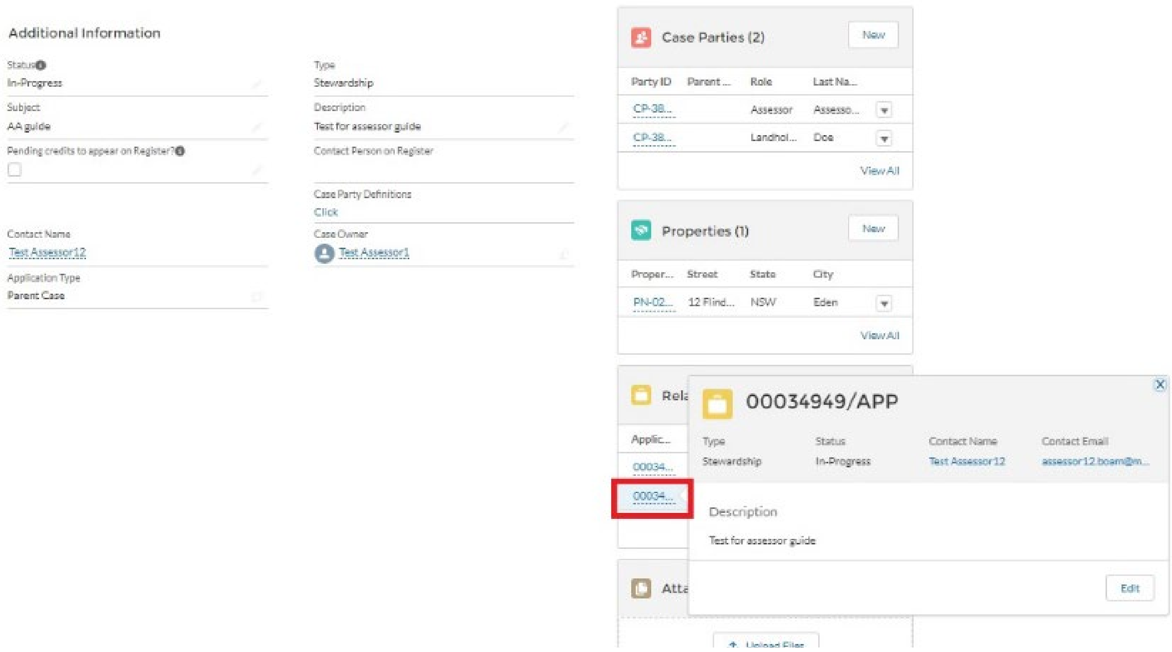


Figure 38 Application case in the 'Related Cases' tab

Figure 39 'Submit' button for a BSA application

24. To add attachments, click 'Upload Files' on the 'Attachments' tab (Figure 40).

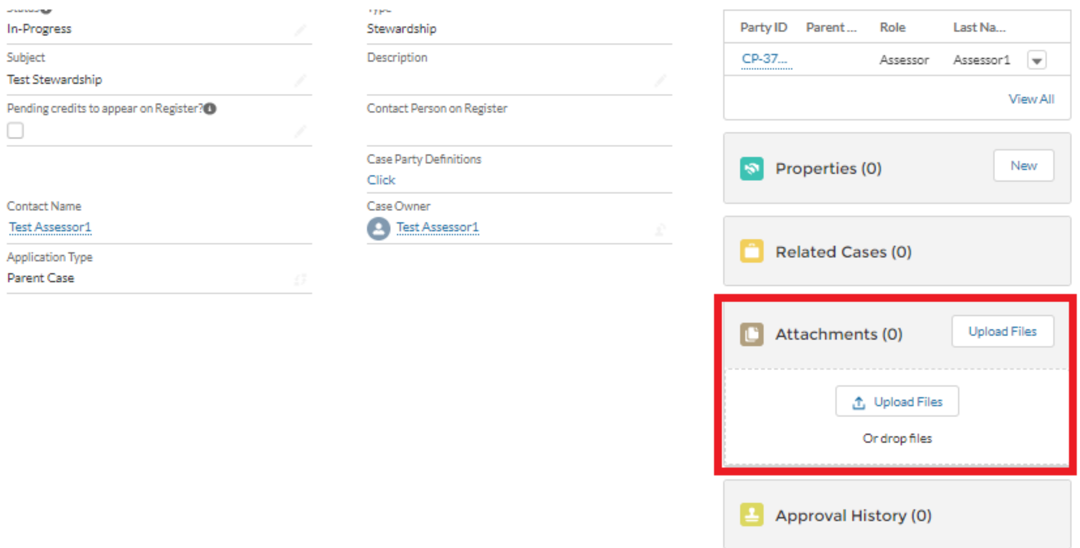


Figure 40 Adding attachments

You may attach shapefiles directly into BOAMS by uploading into the attachment section. It is recommended that assessors only upload attachments to **the parent case** to avoid confusion for decision-makers.

The application for a BSA must still be lodged with the Taskforce. Please refer to the 'Stewardship Expression of Interest' webpage for how to submit a BSA application.

Parent and related cases

In BOAMS, it is important to differentiate between parent and related cases. The related assessment case will contain the BAM-C case (Figure 41). Applications and agreements are also related to the parent case, but do not contain the BAM-C case. A parent case may have multiple related cases; for example, a biodiversity stewardship assessment will have the BAM-C assessment related case and an application related case.

Related cases can be found on the 'Related Cases' tab on a parent case page (Figure 41). The case page of a related case has a link to its parent case under 'Related Parent Cases' (Figure 42).

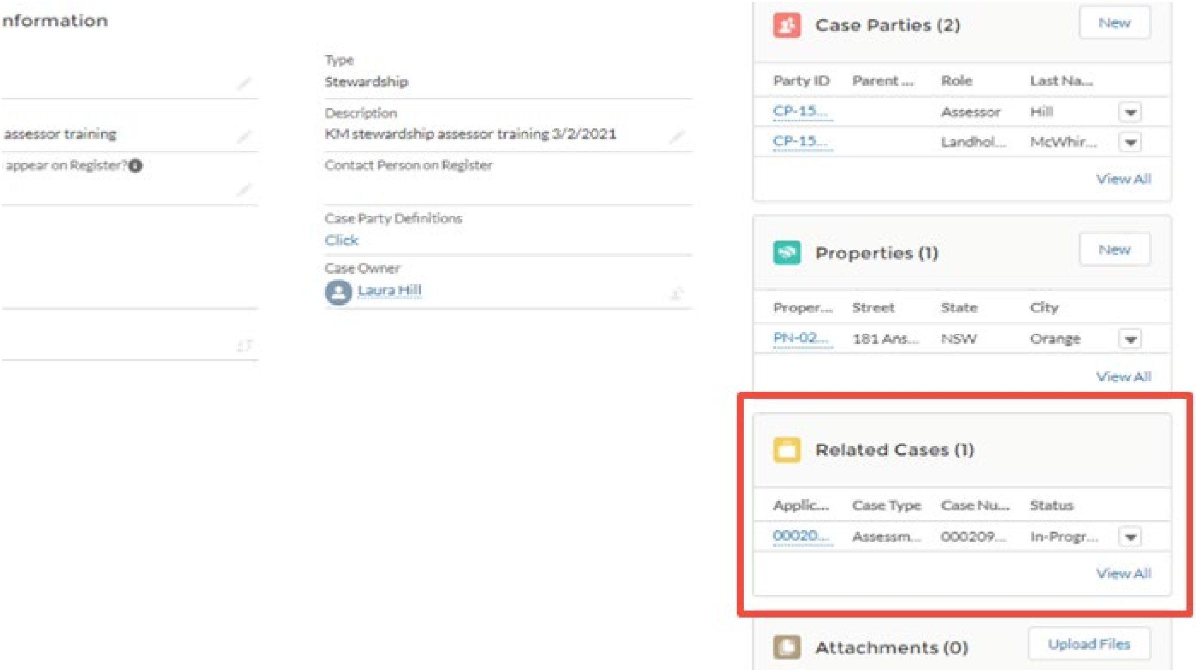


Figure 41 Finding related cases within a parent case

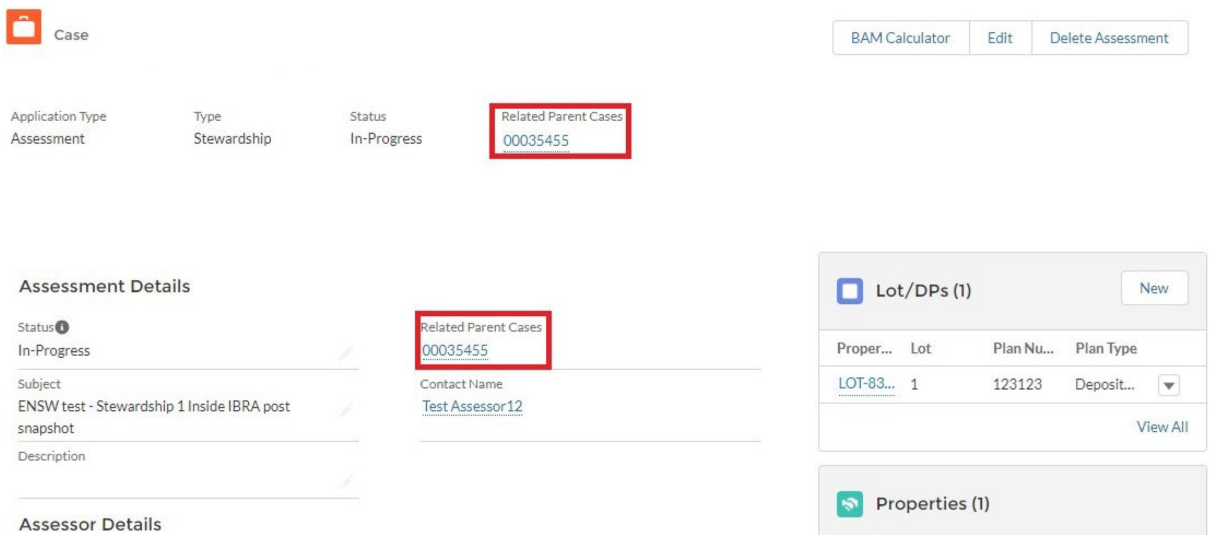


Figure 42 Links on the related case page to its parent cases

Adding case parties to assessment cases

Case parties are entities that have an association with the case. Case parties can be the landholder, assessor, authorised person, etc.

An account for a person or business must be created before that person or business can be linked to a case as a case party.

To link a case party to an assessment case, click 'New' on the 'Case Parties' tab (Figure 43). Select the relevant record type for the case party in the 'New Case Party' dialog box and click 'Next' (Figure 44).

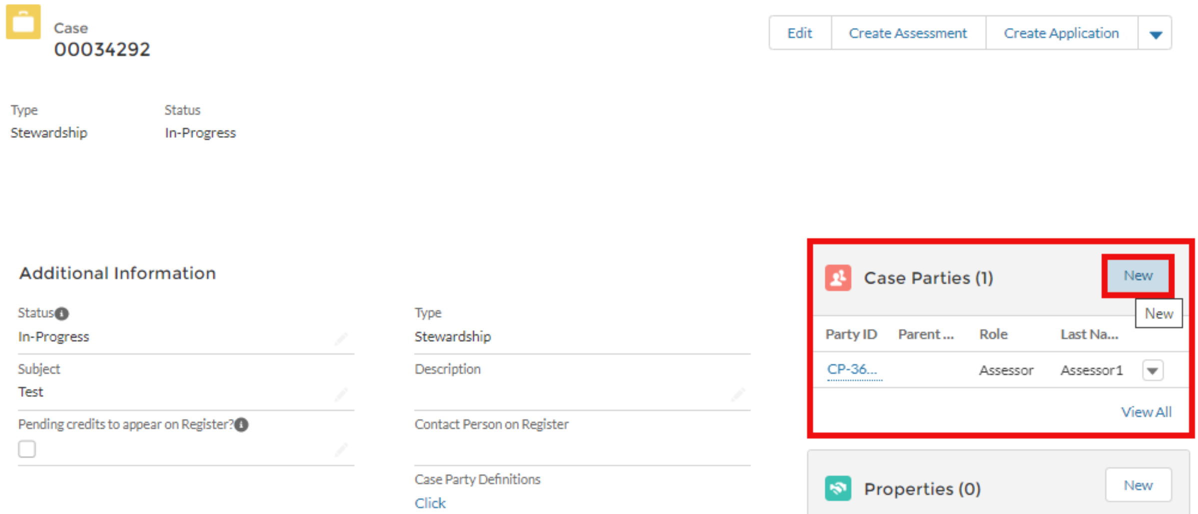


Figure 43 Adding a new case party to a case

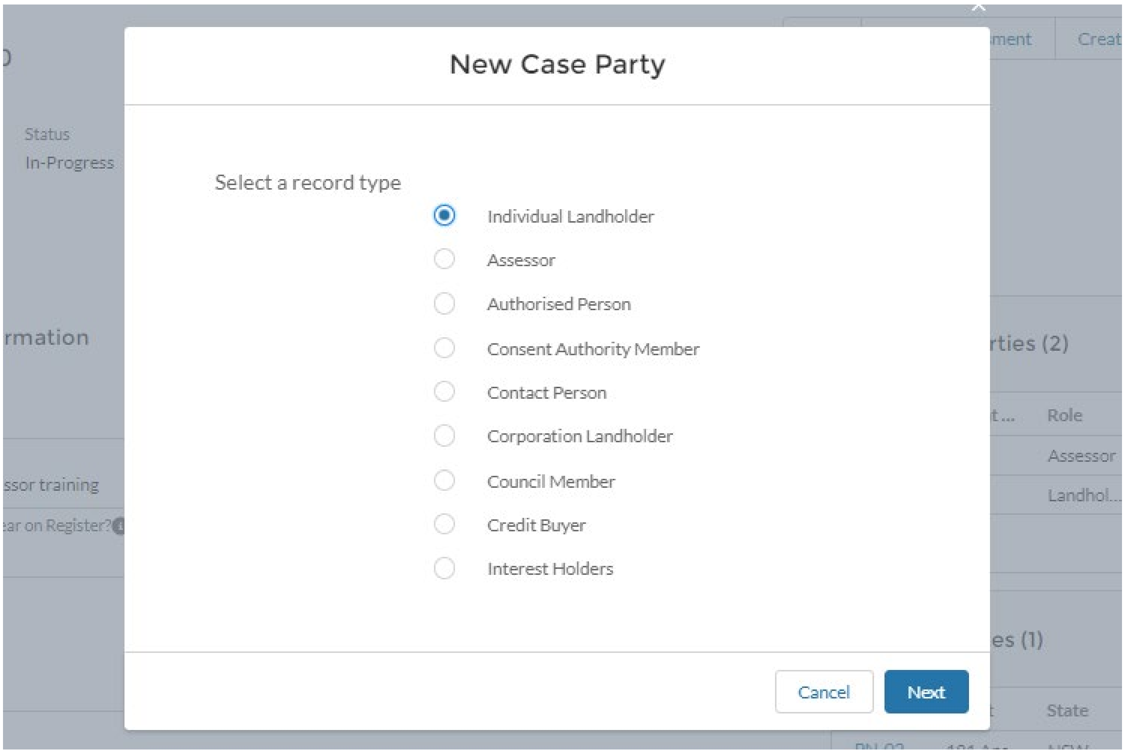


Figure 44 Selecting the type of case party

A landholder (individual or corporation) case party is required to be linked to the case in order to finalise and submit the BAM-C assessment. A stewardship case must also have a contact person case party and a legal authorised person case party where someone is legally authorised to act on behalf of the landholder; for example, a Director of the corporation landholder.

Assessors can add several types of case parties to an assessment case (Table 5). An assessor will need specific information to create each type of case party record in BOAMS (Table 6). Credit buyer and interest holders case parties are not case types that are relevant to assessors.

Table 5 Descriptions of case party types

Case party type	Description	Examples of use of this case party type
Individual landholder	The owner of the subject land that is an individual person. For example, the owner of the land proposed for a BSA, or the owner of the subject land proposed for development, an activity, vegetation clearing or biodiversity certification.	An individual landholder applying for a BSA An individual proponent for a development or vegetation clearing proposal A partner in an individual partnership
Assessor	An accredited assessor working on the assessment. Additional assessor case parties may be added where multiple assessors are working on an assessment or ownership of an assessment is being transferred to another assessor. Accredited assessors must not enter themselves as authorised persons unless they hold the appropriate legal authority (e.g. a valid power of attorney) to act as the authorised person.	An additional assessor working on the case for an assessment
Authorised person	The person who has legal authority to act on behalf of another party. For example, a company director, company secretary, someone acting under a power of attorney.	A director or secretary under section 127 of the *Corporations Act 2001* (Cth) A trust
Consent authority member	Determining authority for activities assessed under Part 5 of the EP&A Act and for departmental regional branches reviewing BARs. Detailed guidance on adding a consent authority member case party is available in *Assessor Update 48*.	The department A public authority other than a council
Contact person	The public contact for phone enquiries and for listing of information on the public registers. A contact person does not have to have legal authority to act; however, the contact person may also be an authorised person.	The individual who is the contact person for the case

Case party type	Description	Examples of use of this case party type
Corporation landholder	The owner of the subject land that is a corporation. For example, the corporation that owns the land proposed for a BSA or the corporation that owns the subject land proposed for development, an activity, vegetation clearing or biodiversity certification.	A landholder that is a business or other organisation that is applying for a BSA A proponent that is a business or other organisation applying for vegetation or development clearing A partner in a business or other organisation partnership A public authority other than a council
Council member	Local councils, being the consent authority under Part 4 of the EP&A Act reviewing Biodiversity Development Assessment Reports. Detailed guidance on adding a consent authority case party is available in *Assessor Update 48*.	A local council

Table 6 Information required to create a case party record according to case party type

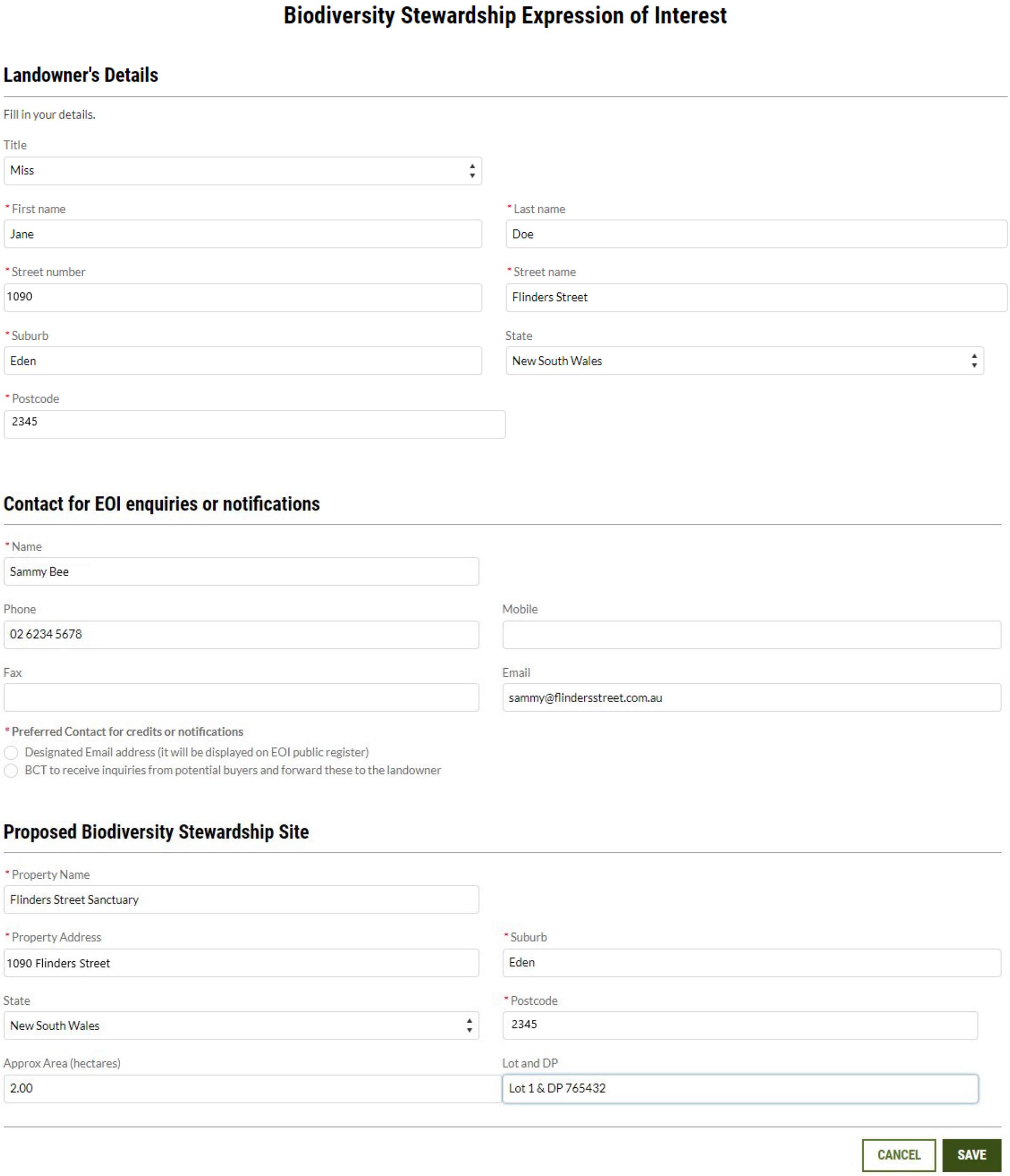
Fields to be completed	Individual landholder	Corporation landholder	Authorised person	Contact person	Consent authority member	Council member	Assessor
Check the box if this case party will be the contact shown on the public register	X	X	X	X			
BOAMS customer account number	X	X	X	X			
Unique email address (used for the relevant BOAMS customer account)	X		X	X			
Australian Business Number (ABN)		X					
Australian Company Number (ACN)		X					
Signatory category (i.e. category of legal authority to act on behalf of another case party)			X				
Details of the other person or entity this case party is acting on behalf of			X	X			
Consent authority/council name (as it is registered in BOAMS)					X	X	
Person details (name, contact number, address)							X
Assessor accreditation number							X
Check the box if this assessor is the current case owner							X

Creating an expression of interest case

1. To create an EOI case, go to the BOAMS landing page and select ‘Expression of Interest’ (Figure 45).

Figure 45 ‘Expression of Interest’ button on BOAMS landing page

2. Enter the required information for the landholder details, contact for EOI enquiries or notifications and proposed stewardship site sections (Figure 46).



Biodiversity Stewardship Expression of Interest

Landowner's Details

Fill in your details.

Title
Miss

*First name
Jane

*Last name
Doe

*Street number
1090

*Street name
Flinders Street

*Suburb
Eden

State
New South Wales

*Postcode
2345

Contact for EOI enquiries or notifications

*Name
Sammy Bee

Phone
02 6234 5678

Mobile

Fax

Email
sammy@flindersstreet.com.au

*Preferred Contact for credits or notifications
Designated Email address (it will be displayed on EOI public register)
BCT to receive inquiries from potential buyers and forward these to the landowner

Proposed Biodiversity Stewardship Site

*Property Name
Flinders Street Sanctuary

*Property Address
1090 Flinders Street

*Suburb
Eden

State
New South Wales

*Postcode
2345

Approx Area (hectares)
2.00

Lot and DP
Lot 1 & DP 765432

CANCEL SAVE

Figure 46 Example information for an EOI

3. Once you have saved, your EOI case will appear. You can edit your case via the 'Edit' button at the top right of the screen (Figure 47).

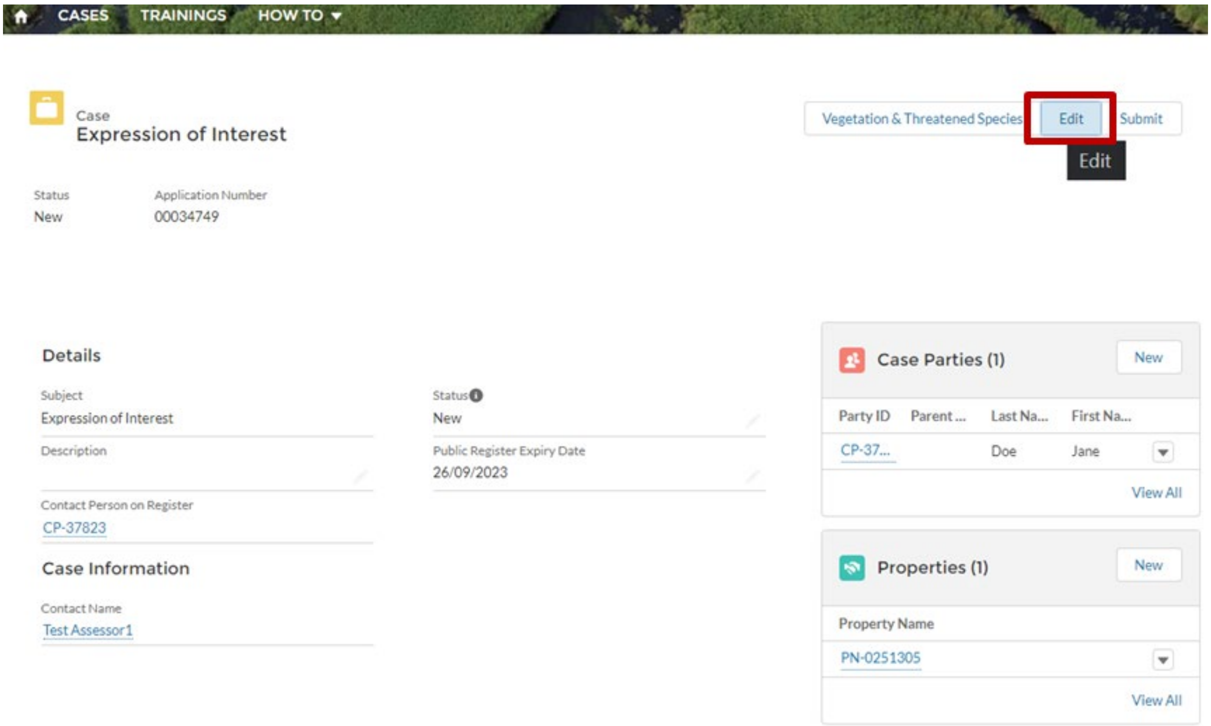


Figure 47 'Edit' button for an EOI case

4. Editing your case allows you to add in a description and update the EOI expiry date on the public register (Figure 48).

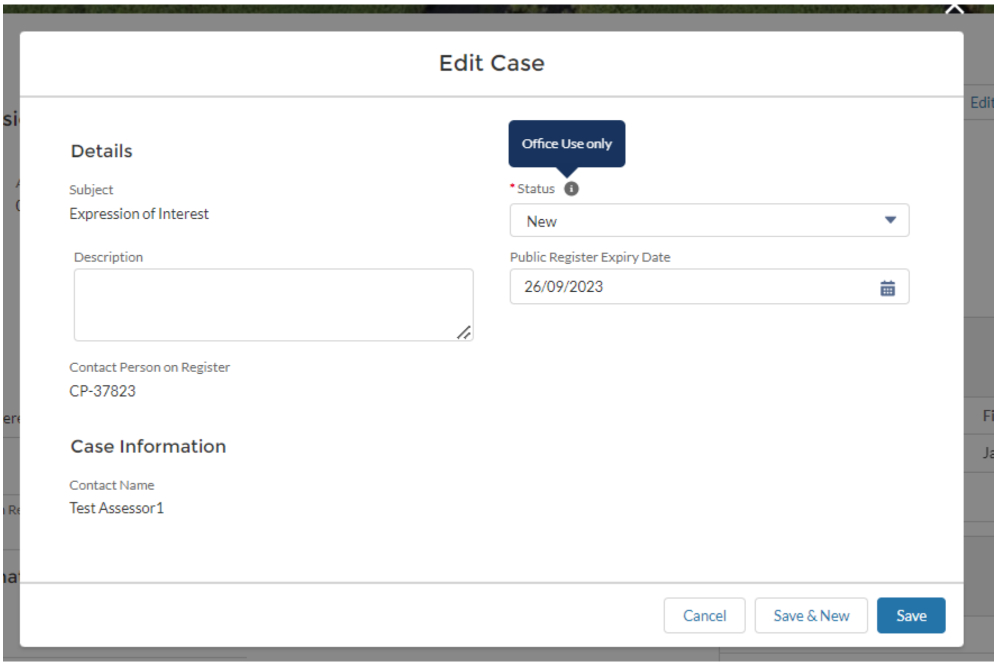


Figure 48 Editing the details of a case

5. To include information about biodiversity values on site, click 'Vegetation & Threatened Species' at the top right of the EOI case page (Figure 49).

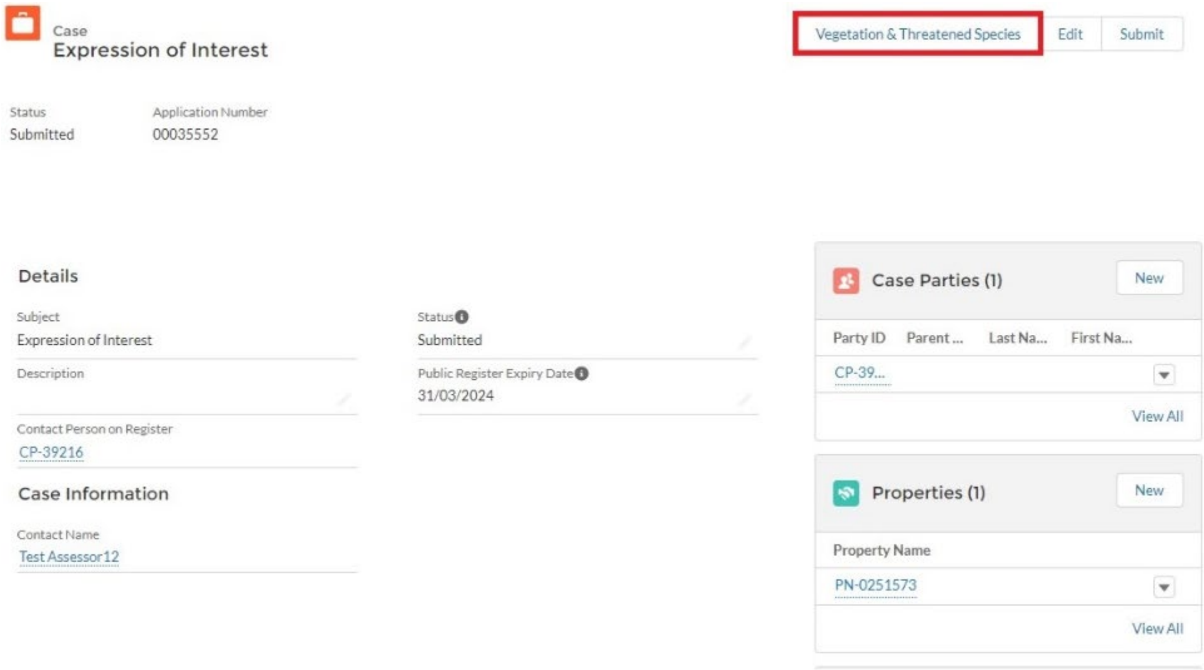


Figure 49 'Vegetation & Threatened Species' button for an EOI case

Ensure your web browser has allowed pop-ups from BOAMS for the 'Vegetation & Threatened Species' tab to open.

6. A new tab will open in your web browser to enter the information about vegetation and threatened species on the site.
7. Nominate the IBRA region and IBRA subregion from the 2 drop-down lists (Figure 50, Figure 51). Both these fields are mandatory.

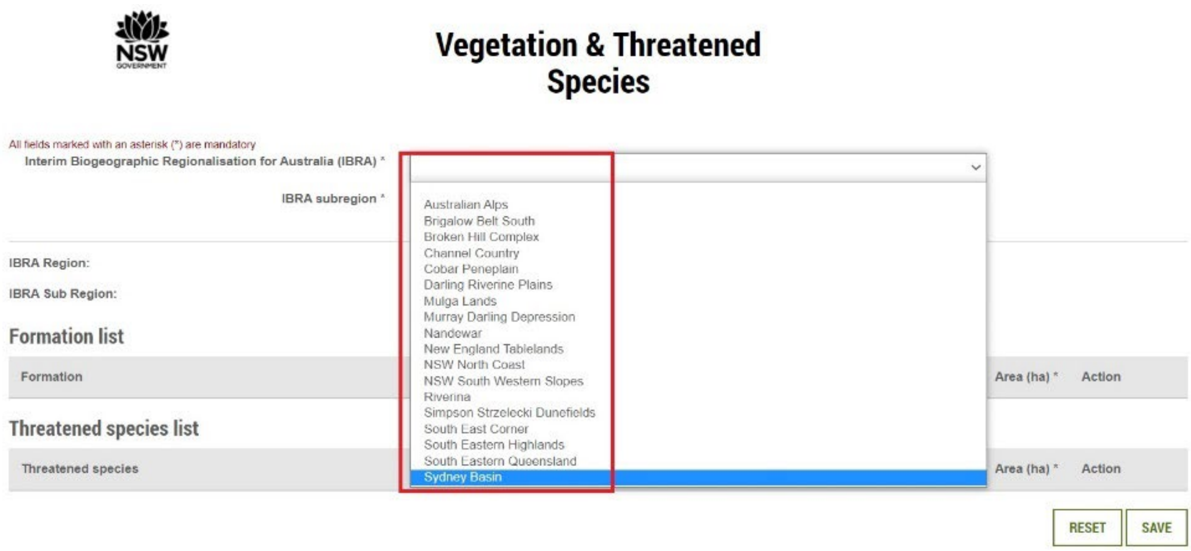


Figure 50 Nominating the IBRA region

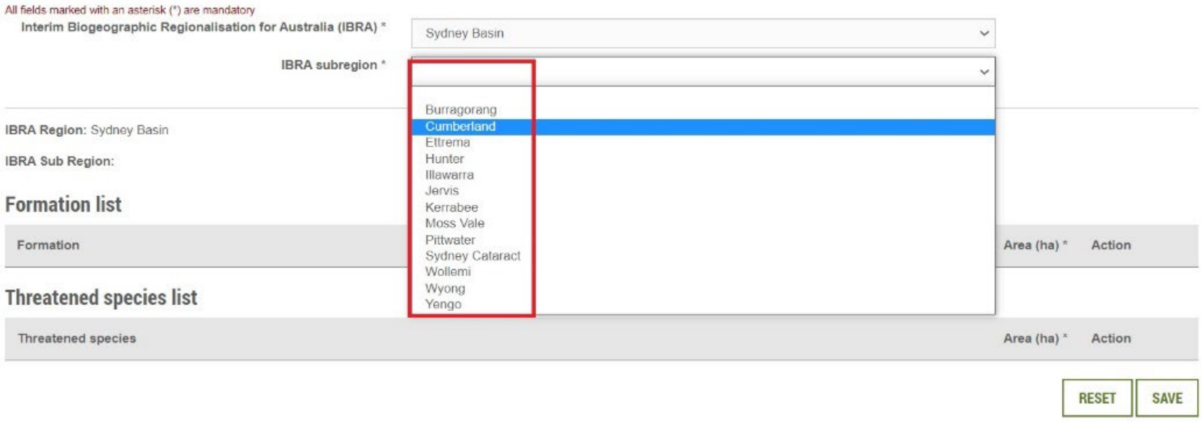


Figure 51 **Nominating the IBRA subregion**

8. Include the vegetation formation, plant community type (PCT) and threatened species. While not mandatory, it is recommended this information is included to create a comprehensive EOI listing.

   To add a vegetation formation, click on the field and select from the drop-down list (Figure 52). Only vegetation formations in the nominated IBRA region and subregion will be available for selection.
   Scroll down to 'Formation list' and enter the area of the formation in hectares (Figure 52).

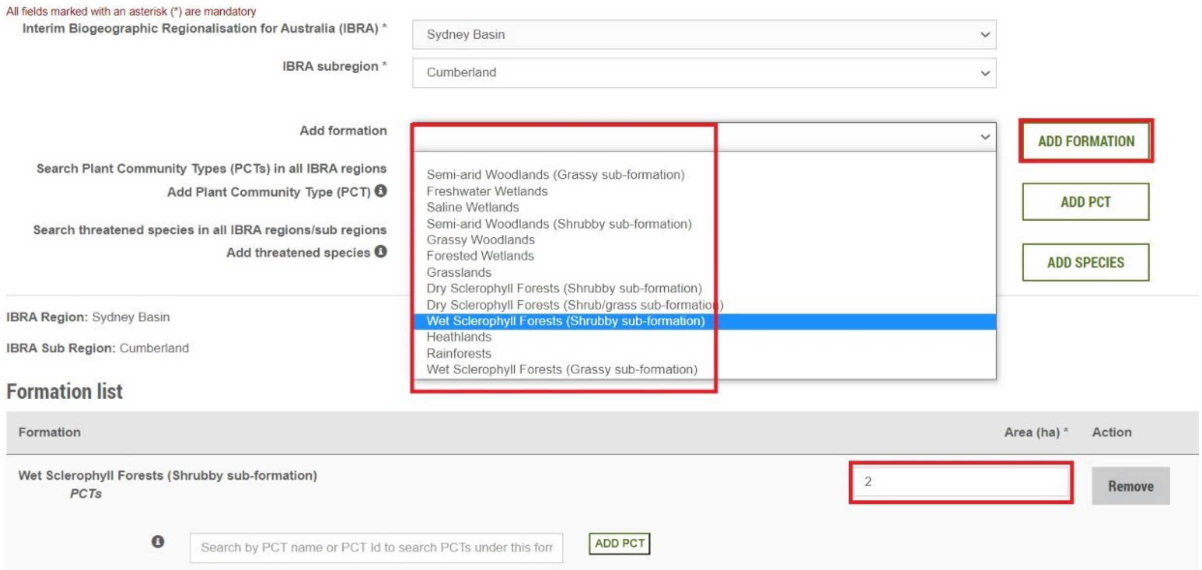


Figure 52 **Adding a vegetation formation and its area**

9. To add PCTs and/or threatened species, click on the 'Add Plant Community Type' field and begin typing to search for relevant results. Only PCTs and threatened species in the nominated IBRA region and subregion will appear in the results list unless the tick box is checked to search across all regions and subregions (Figure 53).

10. Click on the PCT/threatened species to be added from the search results:
    a. Click ‘Add PCT’ to add a PCT to the formation list (Figure 53). Enter an area (ha) for the PCT on the property (Figure 55).
    b. Click ‘Add species’ to add a species to the threatened species list (Figure 54). Enter an area (ha) for the threatened species (Figure 55).

    More vegetation formations, PCTs and threatened species can be added by repeating this step.

11. Vegetation formations, PCTs and threatened species can be deleted by clicking the ‘Remove’ button beside the relevant value in the formation/threatened species list.
12. Once all desired information about vegetation and threatened species has been included, click ‘Save’ (Figure 55).

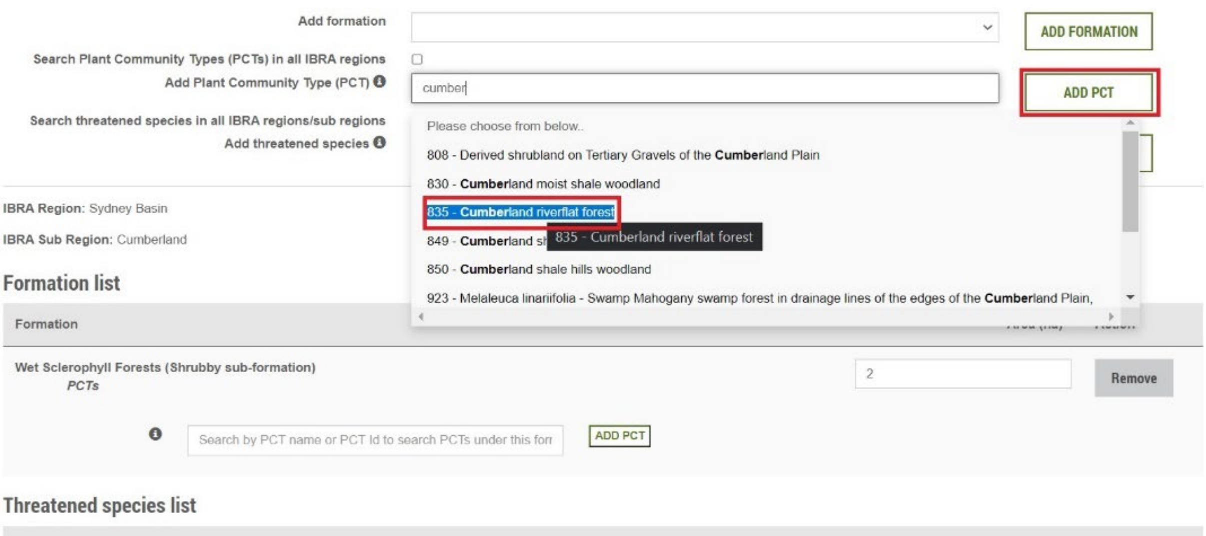


Figure 53 Selecting from the PCT results list and the ‘Add PCT’ button

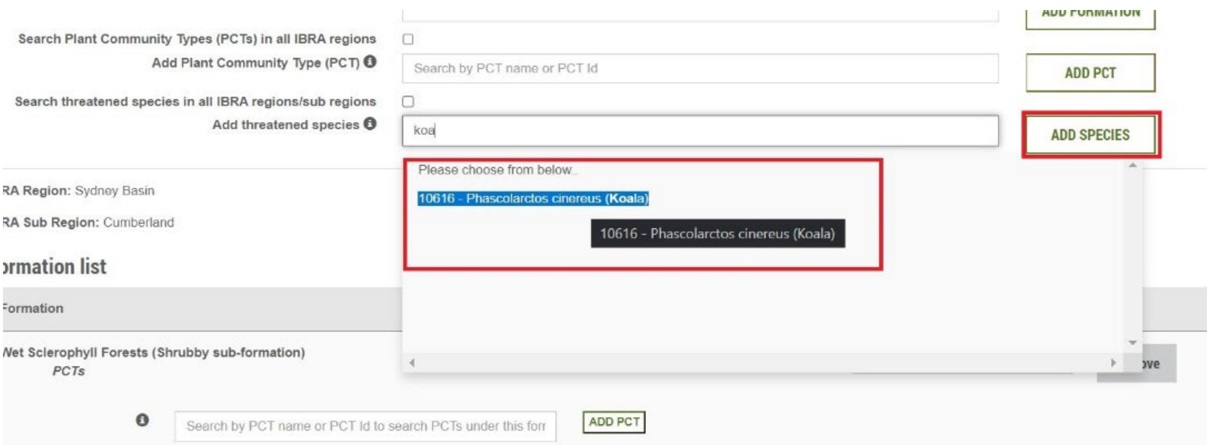


Figure 54 Selecting from the ‘Add threatened species’ results list and ‘Add Species’ button

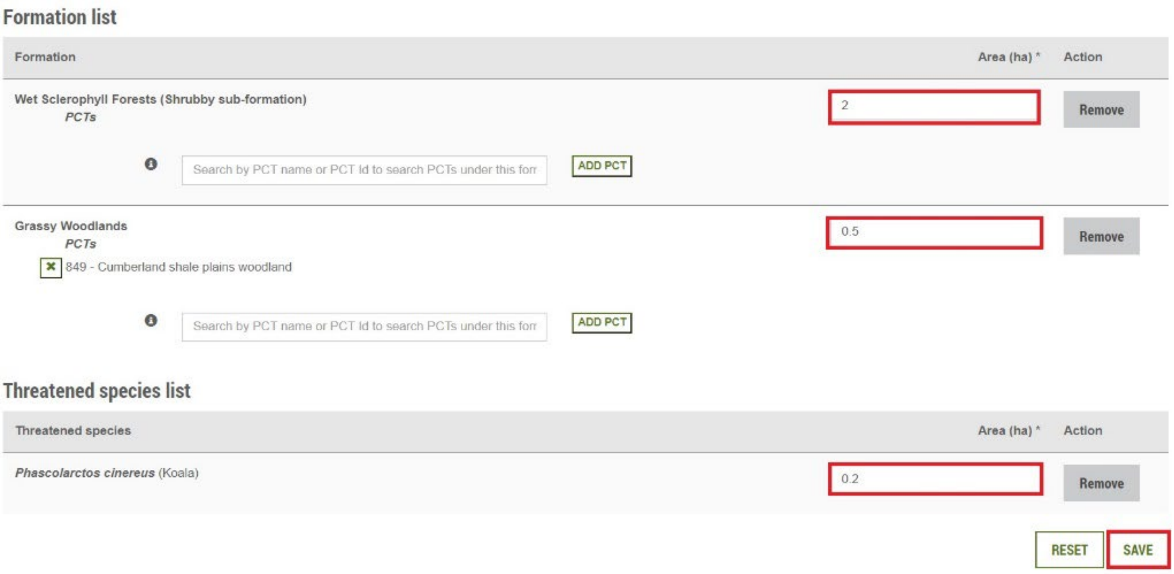


Figure 55 Entering area information for formations and threatened species

13. Return to the case page in BOAMS. This will be in another tab in your browser window. Vegetation and threatened species will now be listed on the 'Vegetation & Threatened Species' tab (Figure 56). If the information does not appear, the webpage may need to be refreshed to update the tab with what's just been added.
14. Once all desired information has been included, click 'Submit' to submit the EOI case to appear on the public register (Figure 56). A green pop-up will appear at the top of the screen confirming the case has been submitted successfully.
15. The EOI case will be displayed on the public register for 12 months.

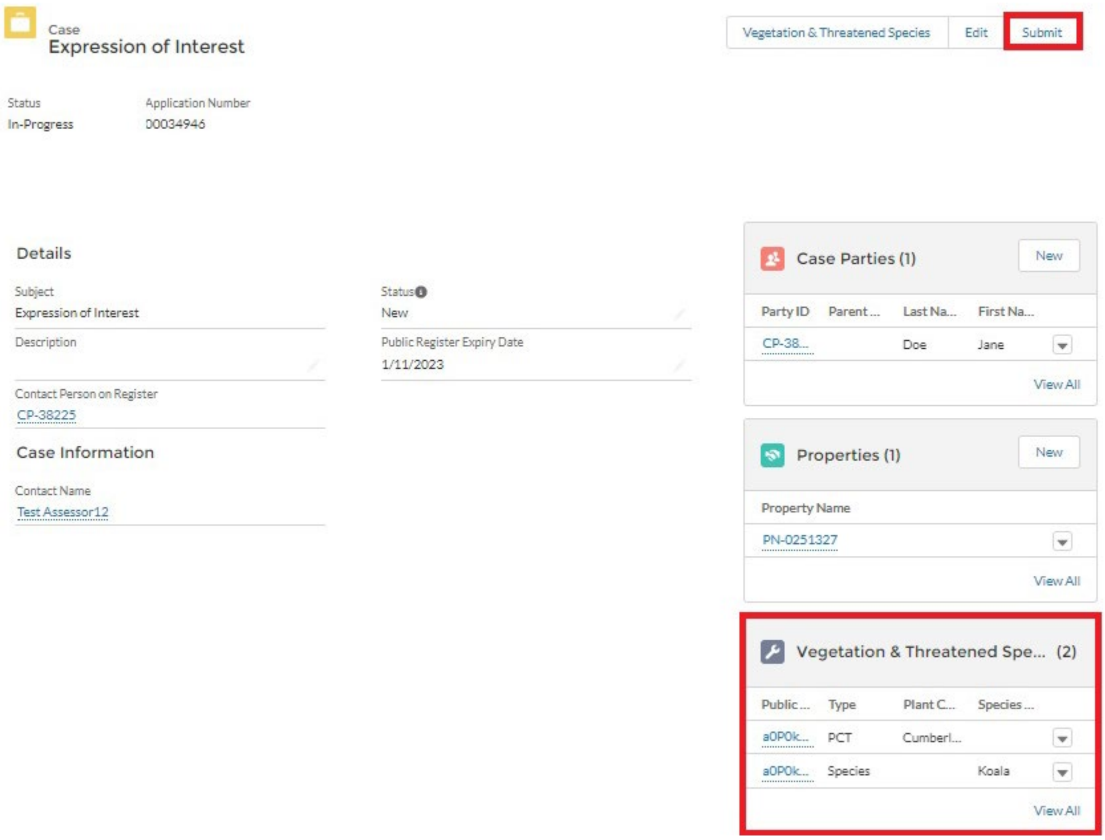


Figure 56 'Vegetation & Threatened Species' tab and 'Submit' button

Creating a credit wanted case

1. To create a credit wanted case, go to the BOAMS landing page and select 'Credit Wanted' (Figure 57).

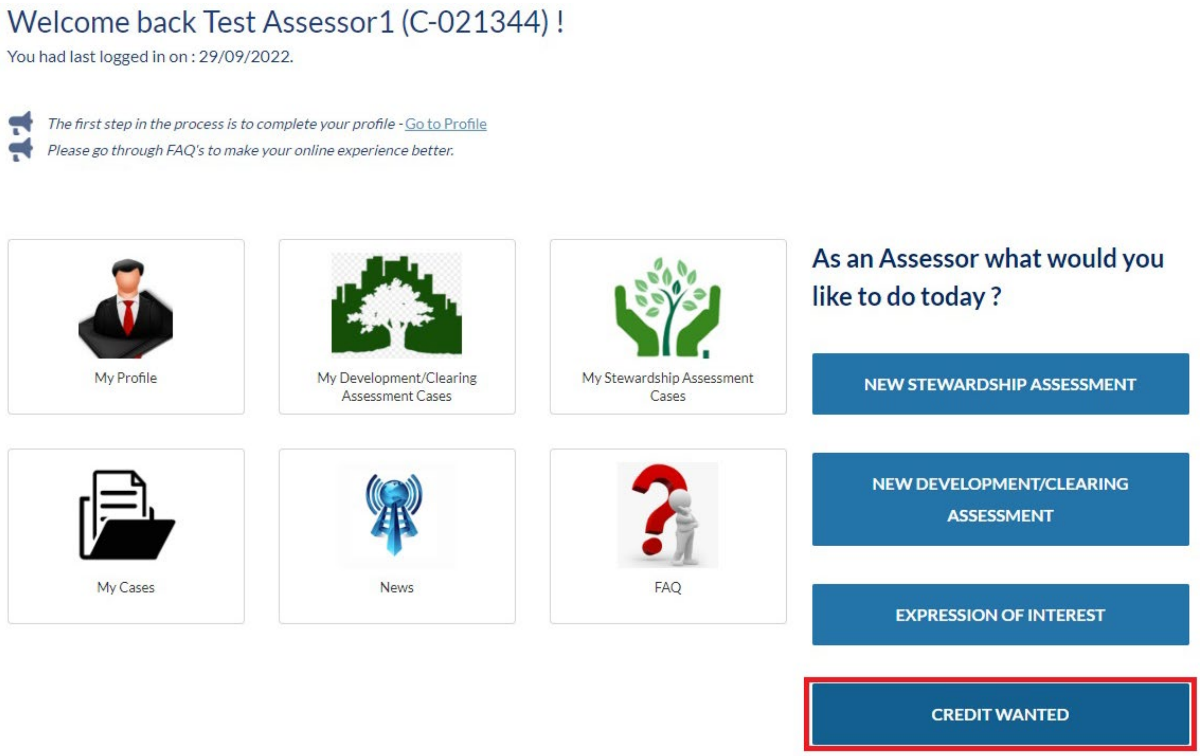


Figure 57 'Credit Wanted' button on the BOAMS landing page

2. Select whether the credits are wanted by an individual or a company. This will change the information that needs to be entered.

3. **For an individual –** enter the required details (Figure 58). At a minimum, put in the first and last name of the individual, their street address and contact details (mandatory fields are marked *). Once completed, click ‘Save’.

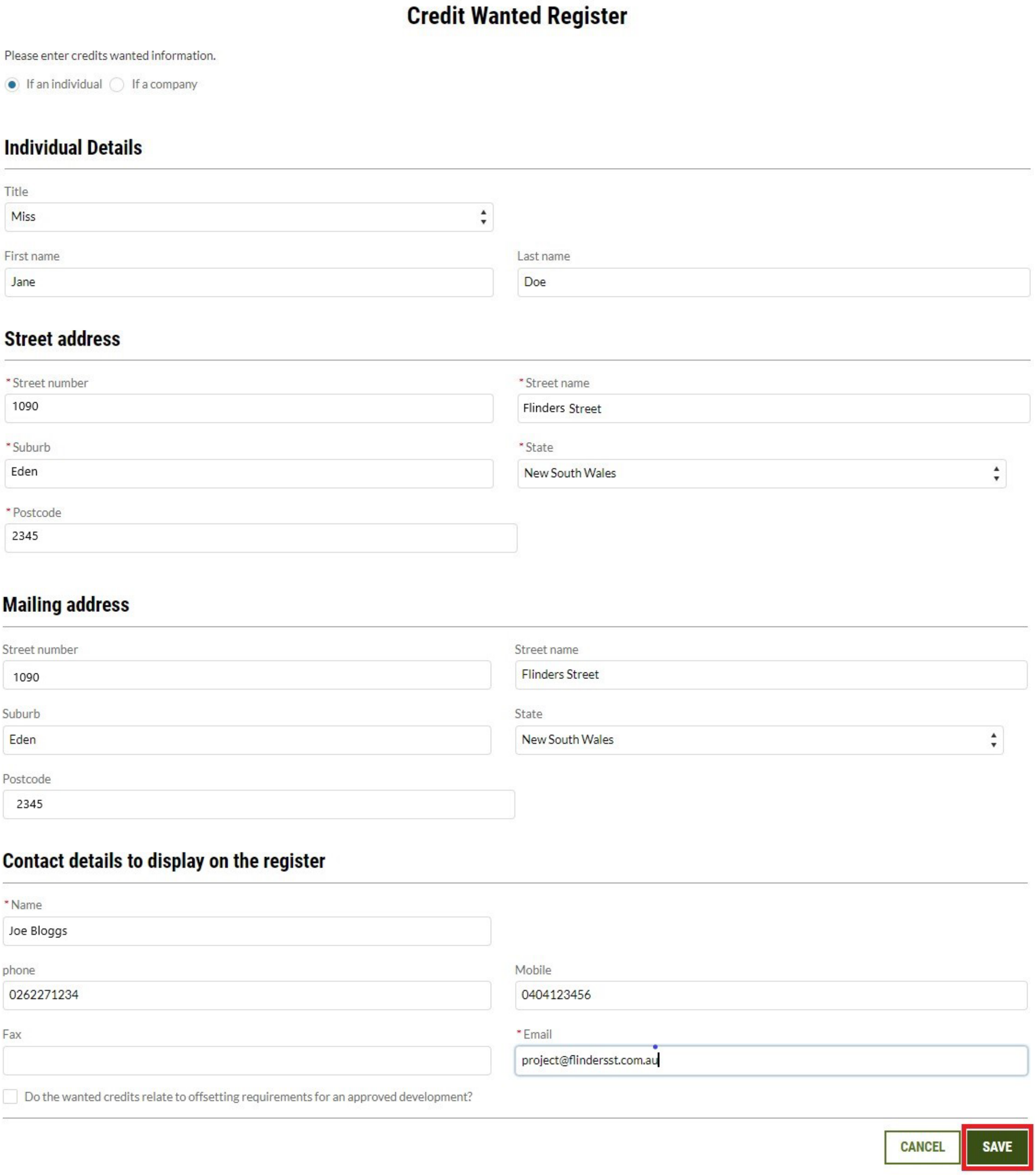


Figure 58 Example information for an individual

4. **For a company** - enter the required details (Figure 59). At a minimum, put in the registered company name, ABN and/or ACN, street address and contact details (mandatory fields are marked *). Once completed, click ‘Save’.

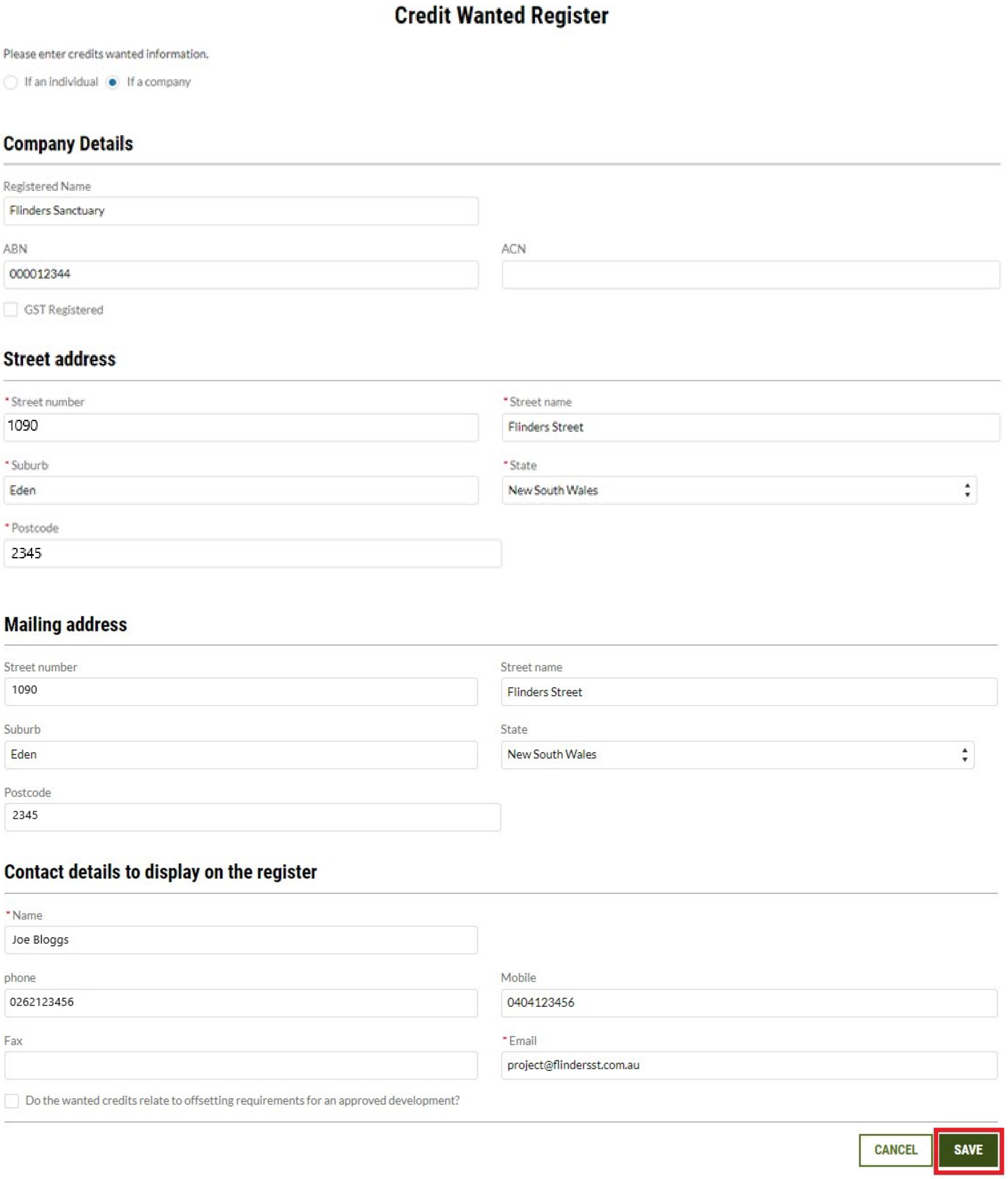


Figure 59 **Example information for a corporation**

5. From here, the credit wanted case will appear. You can edit some fields directly (indicated by the pencil icon), or by clicking ‘Edit’ at the top right of the case page (Figure 60). There will be a case party under the ‘Case Parties’ tab, which is referred to as the default case party.

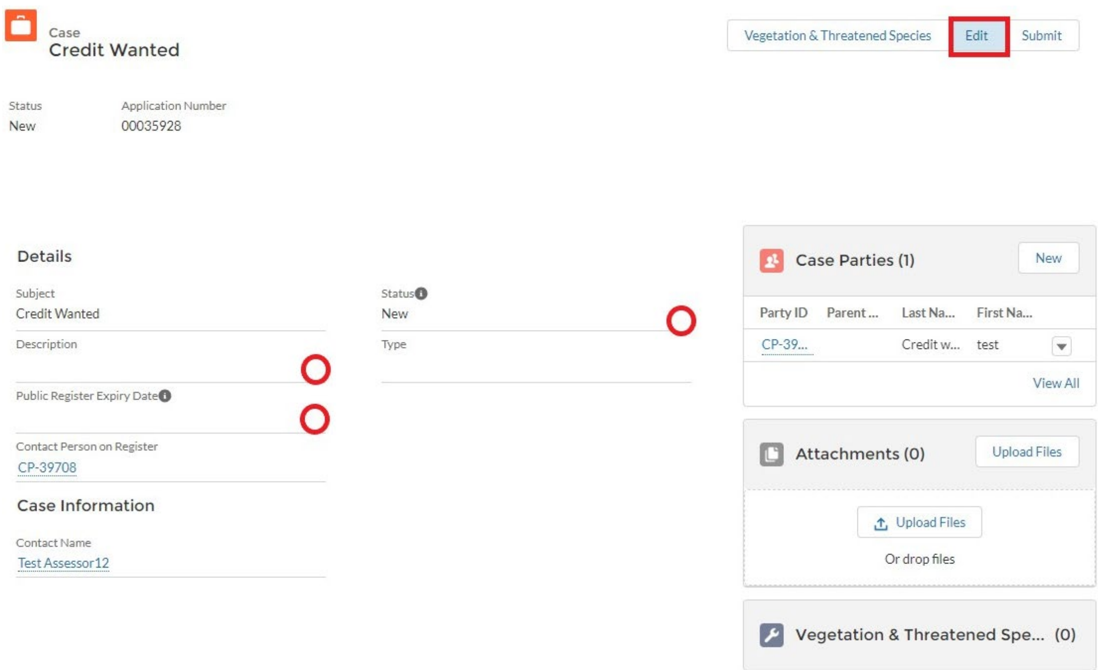


Figure 60 Fields that can be edited directly and the ‘Edit’ button

6. To include information about the credits wanted, click ‘Vegetation & Threatened Species’ at the top right of the case page (Figure 61). A new tab will open in your web browser with fields about the credits wanted.

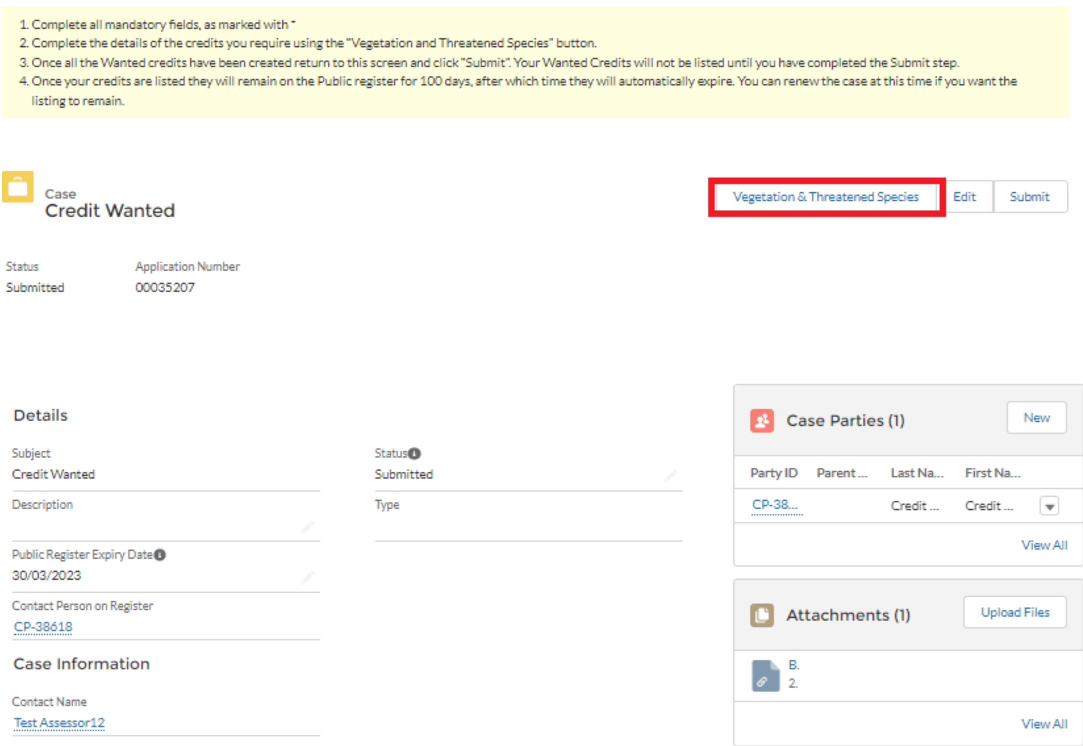


Figure 61 ‘Vegetation & Threatened Species’ button

7. Enter information about the credits wanted. Nominate the IBRA region and subregion from the 2 drop-down lists (Figure 62, Figure 63). Both these fields are mandatory.

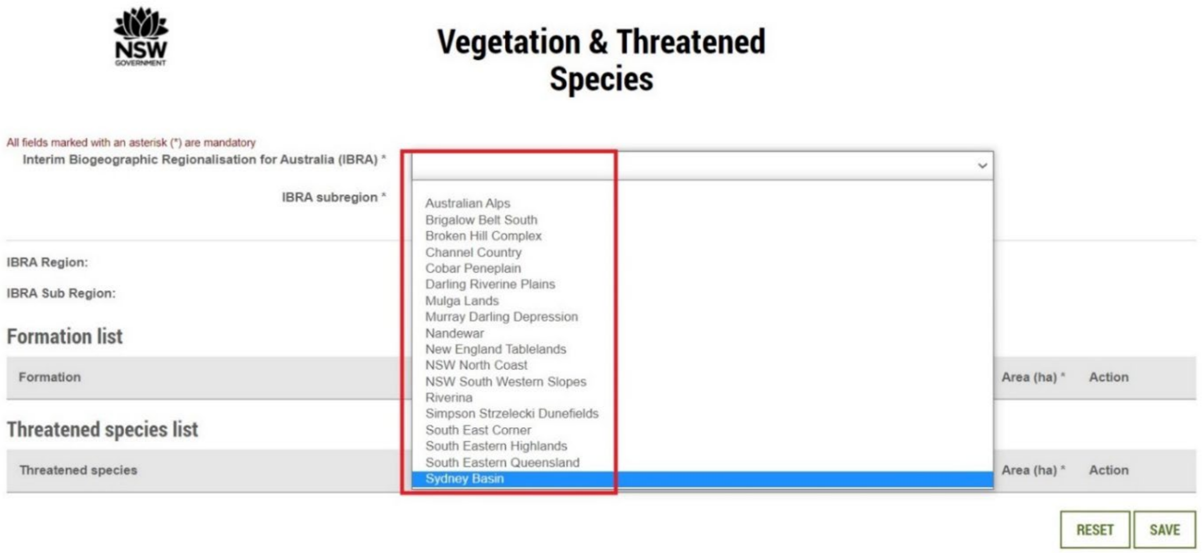


Figure 62 Nominating the IBRA region

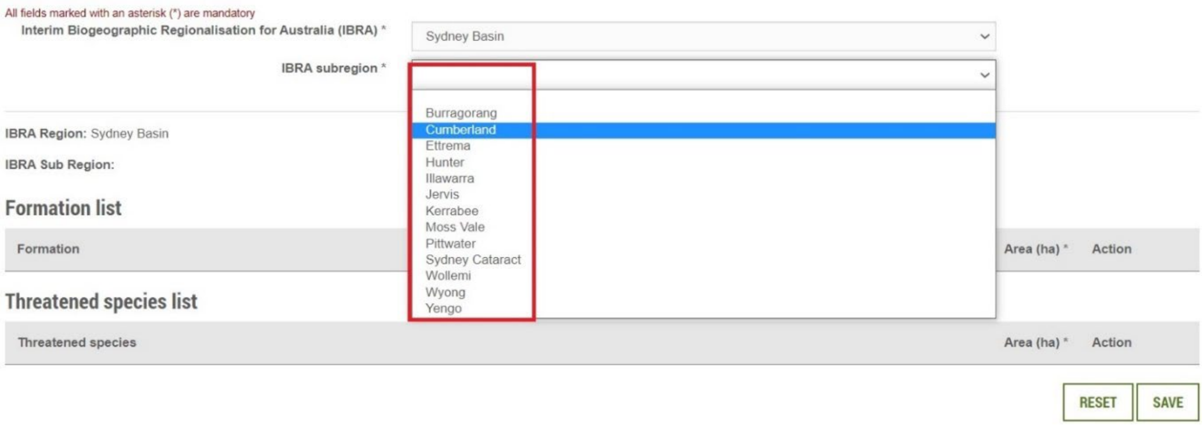


Figure 63 Nominating the IBRA subregion

8. To add PCTs and/or threatened species, click on the field and begin typing to search for relevant results. Only results for PCTs and threatened species in the nominated IBRA region and subregion will appear in the results list unless the tick box is checked to search across all regions and subregions (Figure 64).
9. Click on the PCT/threatened species to be added from the search results:
   a. Click 'Add PCT' to add a PCT (ecosystem credit) to the PCT list (Figure 64). Indicate how many credits for the PCT are wanted (Figure 66).
   b. Click 'Add species' to add a species to the threatened species list (Figure 65). Indicate how many credits for the species are wanted (Figure 66).

   More PCTs and threatened species can be added by repeating this step.
10. PCTs and threatened species can be deleted by clicking the 'Remove' button beside the relevant value in the PCT/threatened species list.
11. Once all desired information about vegetation and threatened species has been included, click 'Save' (Figure 66).

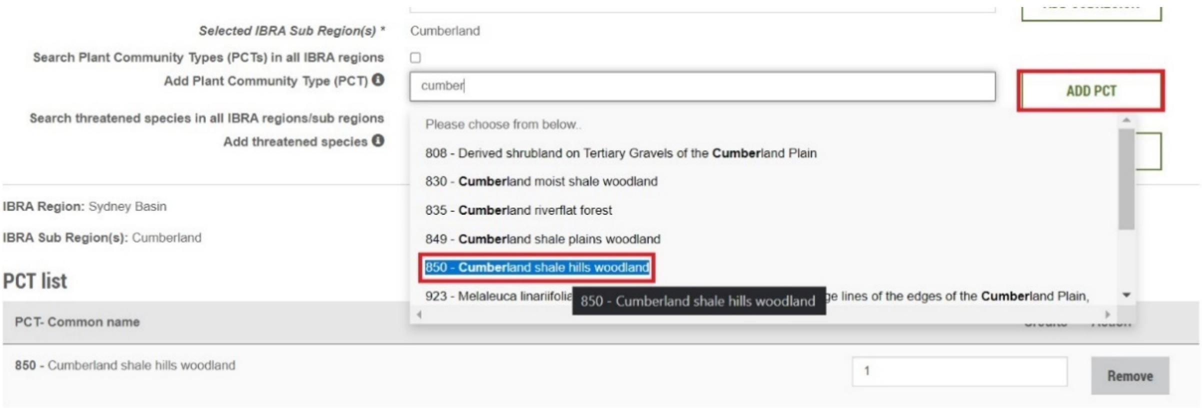


Figure 64 **Selecting from the PCT results list to add ecosystem credits**

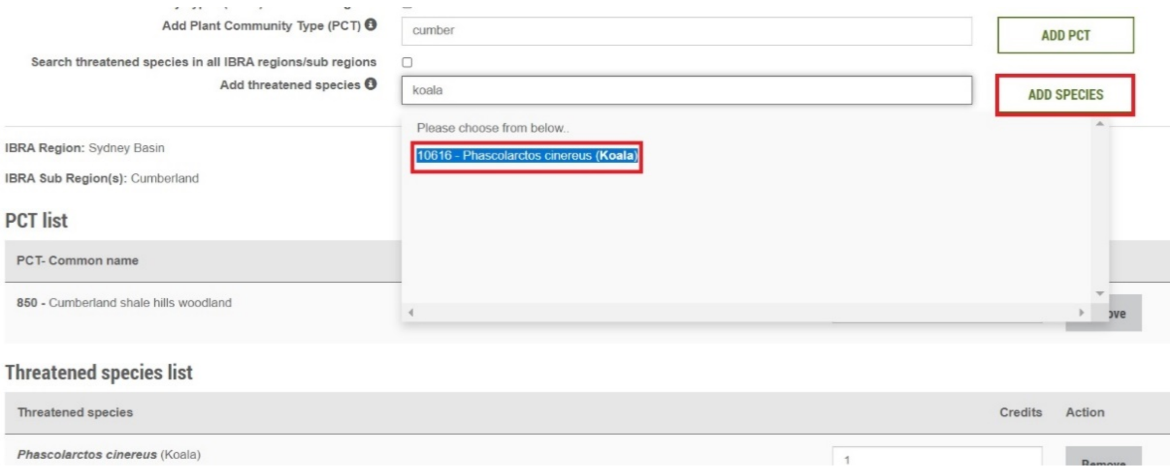


Figure 65 **Selecting from the threatened species results list to add species credits**

Figure 66 **Entering the number of credits wanted for PCTs and threatened species**

12. Return to the case page in BOAMS. Credits wanted will now be listed on the 'Vegetation & Threatened Species' tab (Figure 67). If the information does not appear, the webpage may need to be refreshed to update the tab with what's just been added.
13. Once all desired information has been included, click 'Submit' to submit the credit wanted case to appear on the public register (Figure 67). A green pop-up will appear at the top of the screen confirming the case has been submitted successfully.
14. The case will be displayed on the public register for a default period of 3 months.

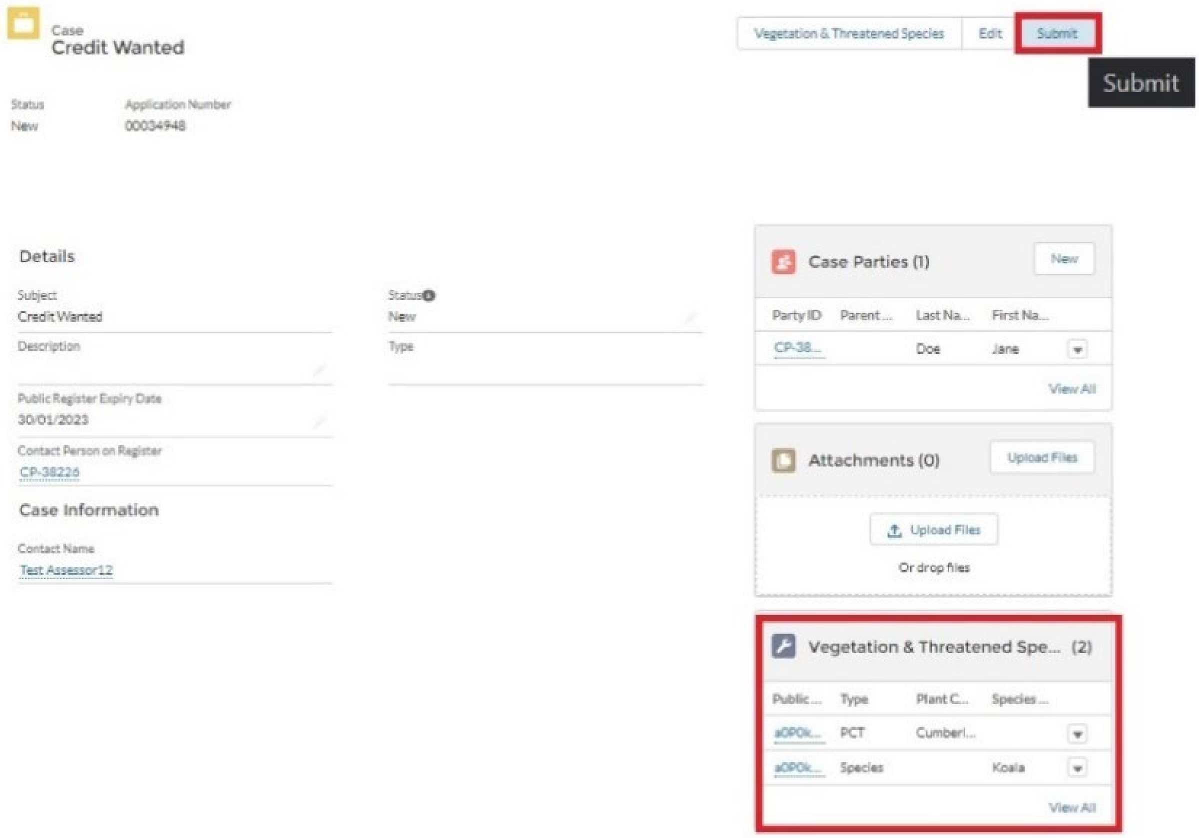


Figure 67 **'Vegetation & Threatened Species' tab and 'Submit' button**

15. The contact person on the listing can be changed at any time:
    a. It is recommended that the contact details on the public register are set on either the default case party or a contact person case party.
    b. Where the current contact details are set on the default case party, the details can be edited on that case party record. The contact details can be removed entirely from the register by unticking 'Show contact details on Public Register?' on that record.
    c. Where the current contact details are set on a contact person case party, that contact can be removed from the register by unticking 'Show contact details on Public Register?'. A new contact person can be set by creating a new contact person case party and ticking 'Show contact details on Public Register?' on the new contact person case party.

Managing cases

This section is about managing your cases in BOAMS. It will show you how to navigate, view, search, edit and delete cases.

Reopening an existing BOAMS case

1. To open an existing in-progress BOAMS assessment case, you can locate the case in 3 ways (Figure 68):
   a. using the search bar
   b. clicking on the cases tab
   c. clicking the relevant tile on the landing page.
2. Once you have located the case, click on the case's 'Subject' field to reopen it (Figure 69).
3. To open an existing in-progress BAM-C case, navigate to the related assessment case (Figure 69). Click 'BAM Calculator' on the top right of the case page to open the BAM-C assessment (Figure 70). Click 'Open' on the top left and select the version of the case you wish to open from the list in the pop-up (Figure 71).

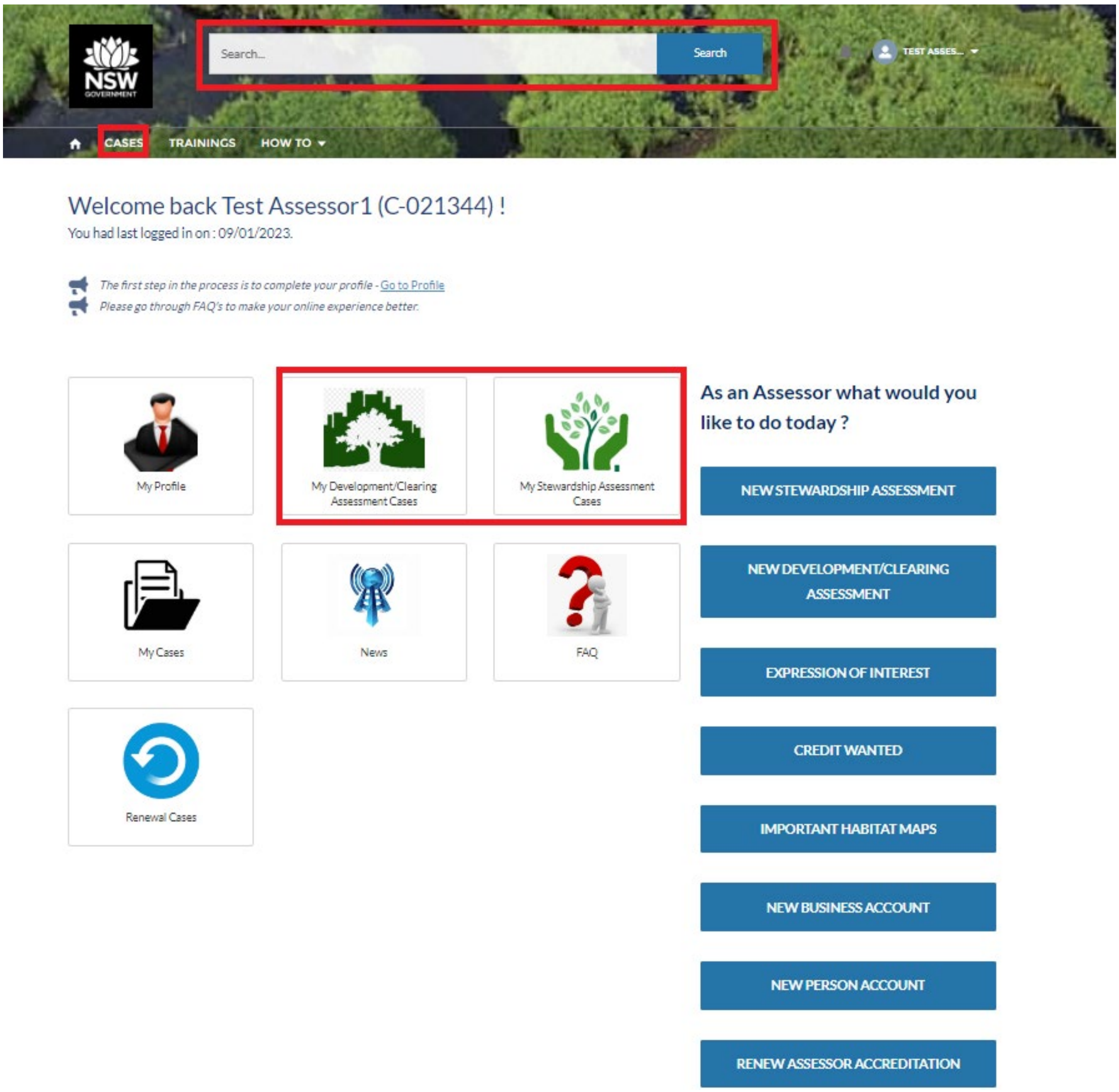


Figure 68 Ways to locate an existing case from the BOAMS landing page

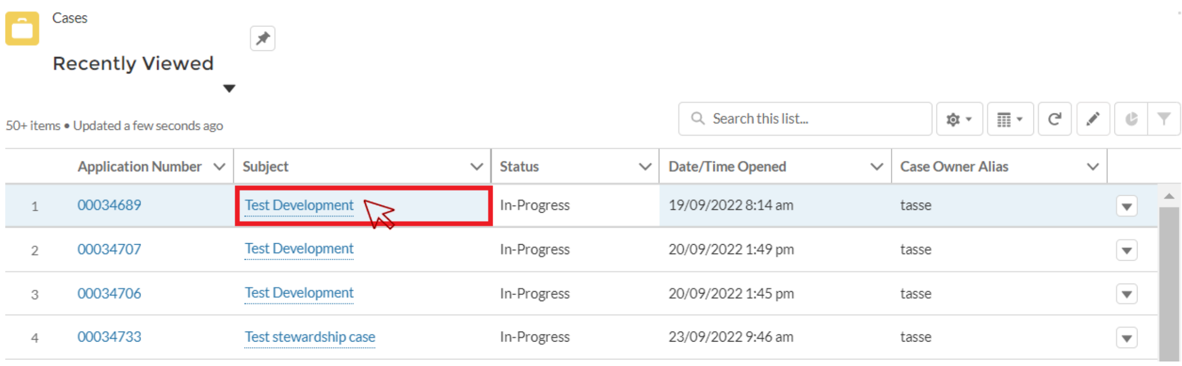


Figure 69 **Opening an existing assessment case or BAM-C case**

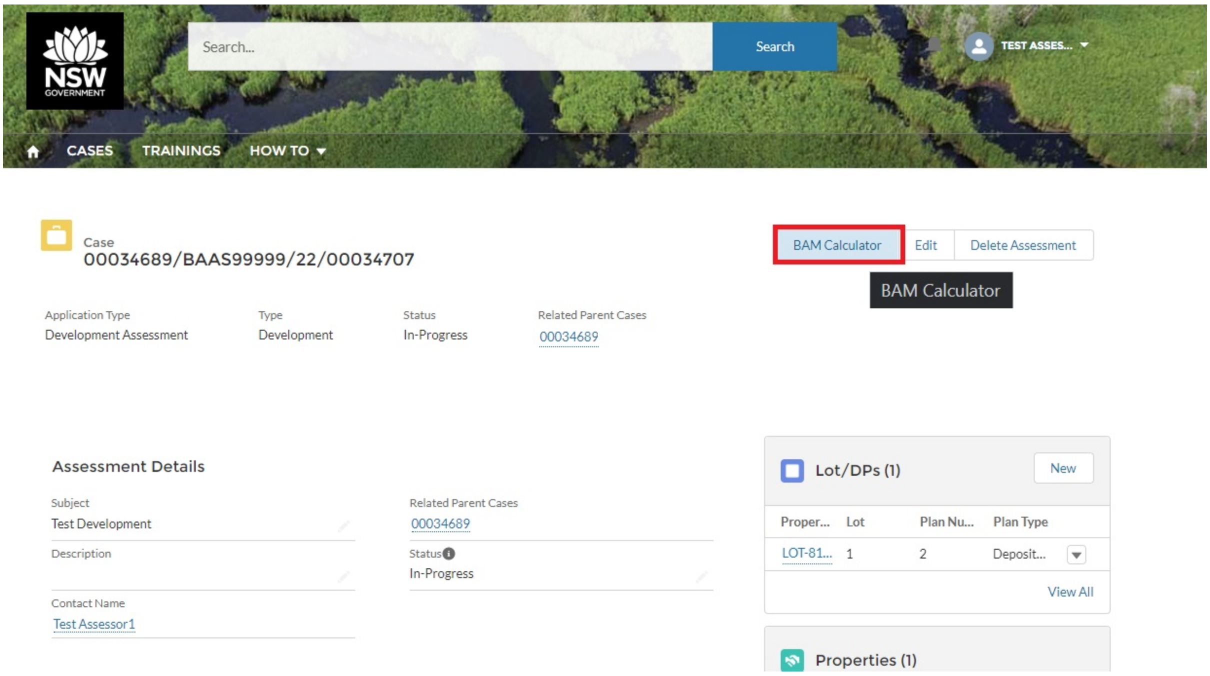


Figure 70 **'BAM Calculator' button on the assessment case page**

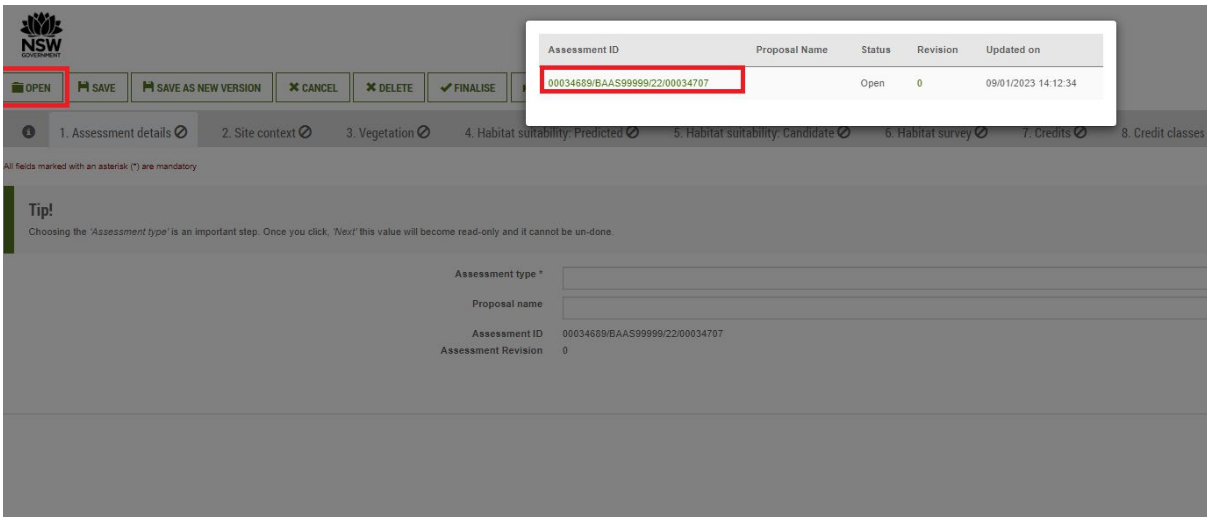


Figure 71 **Pop-up showing current cases in the BAM-C**

4. Once you have completed the BAM-C, you can finalise your development/ stewardship application by submitting the parent case. The steps to do this are provided in the development and stewardship sections above.

You can delete an assessment case by clicking 'Delete Assessment' at the top right of the assessment case page. A pop-up will open to confirm or cancel the request to delete the assessment.

Changing ownership of a case to another assessor

1. To change the ownership of a case to another assessor, add the new assessor as a case party (Figure 72).

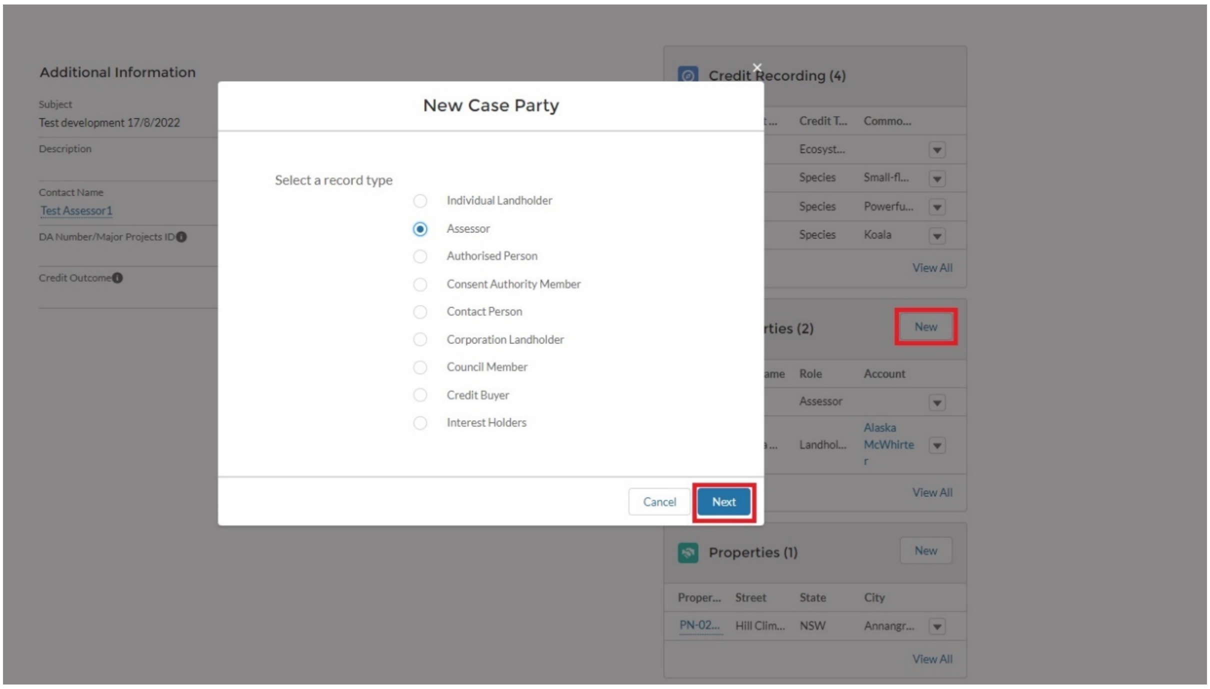


Figure 72 **Adding an assessor case party to a case**

2. Enter the required information for an assessor case party and tick the 'Current Owner' box (Figure 73). The case owner can now be changed to the new assessor from the parent case page. There can only be one current owner of a case, so please untick any that are no longer relevant by editing the case parties. After adding a new assessor, the assessment will need to be reopened and saved to bring the names into the report.

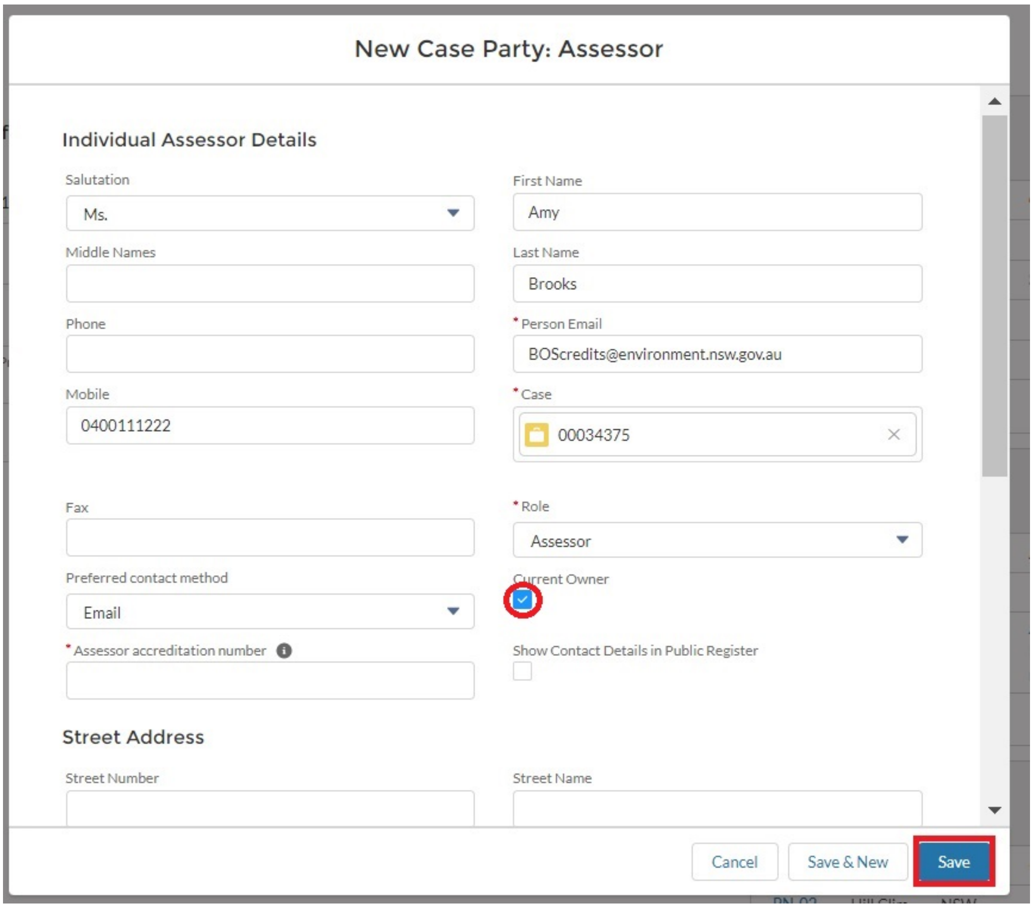


Figure 73 'New Case Party: Assessor' page with 'Current Owner' box ticked

3. On the parent case page, find the 'Case Owner' field and click on the symbol to change owner (Figure 74).

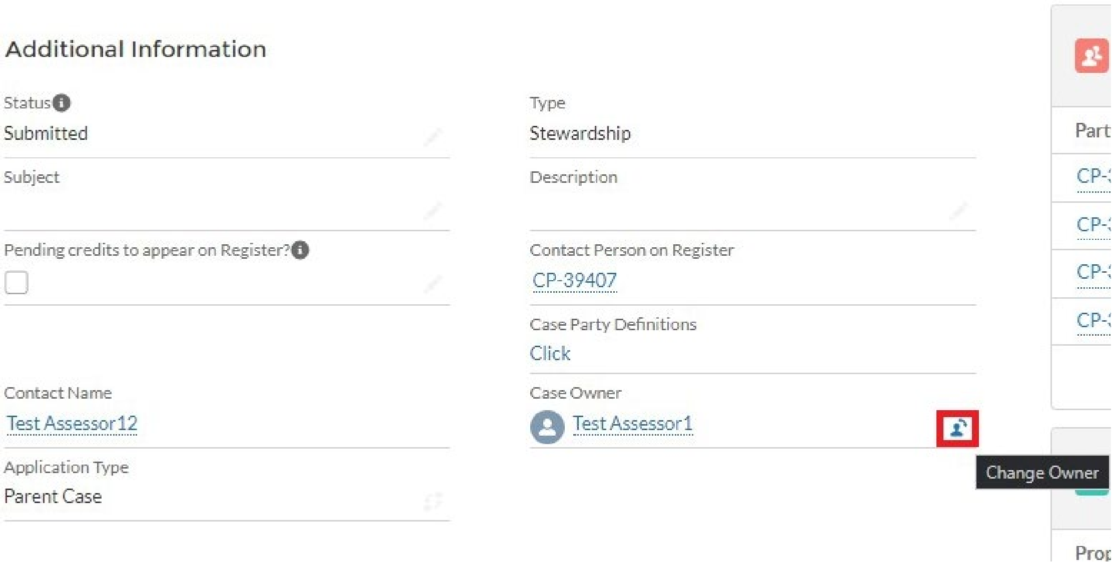


Figure 74 Parent case page with symbol for changing the case owner

4. A 'Change Case Owner' dialog box will appear with a search box for finding the assessor who is taking over ownership of the case (Figure 75). The case owner can be changed to any other assessor in the results list by selecting their name and clicking 'Submit'.

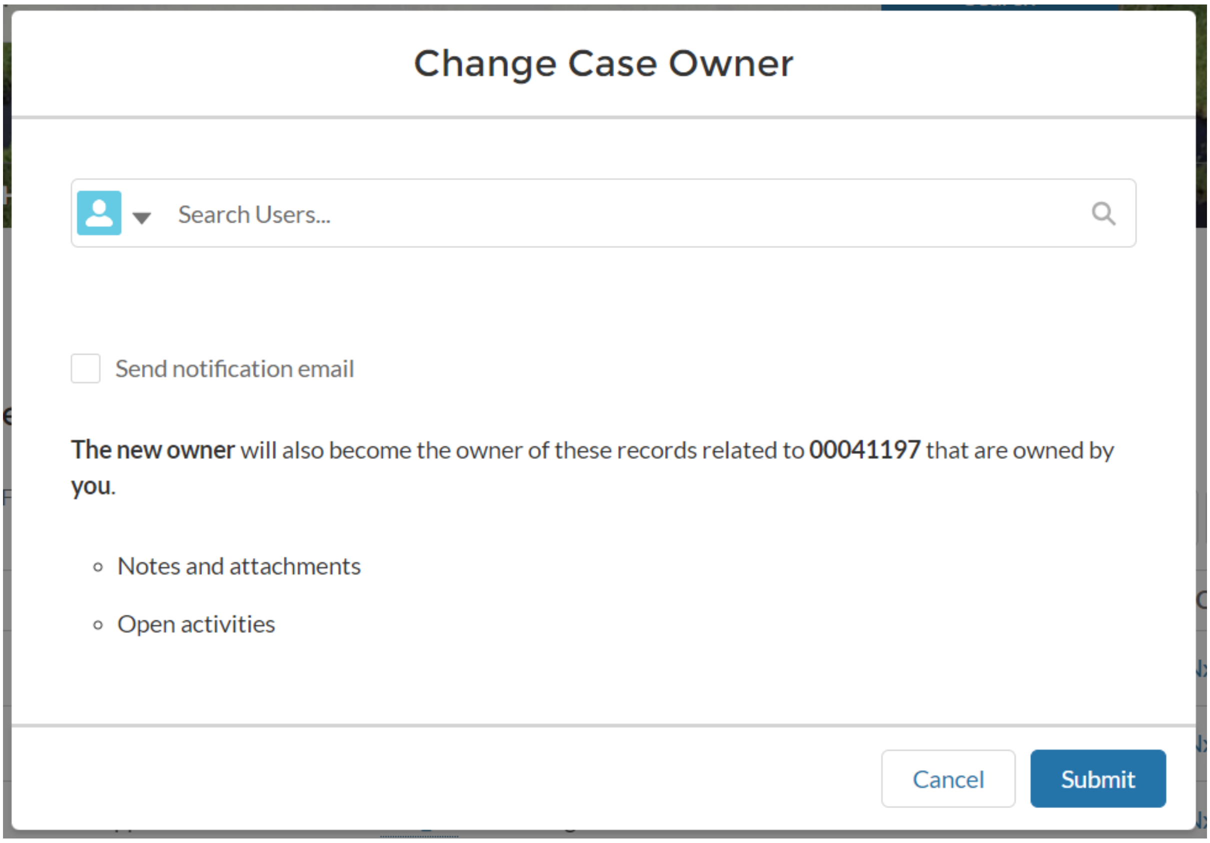


Figure 75 ‘Change Case Owner’ dialog box with search box to find the new assessor

In circumstances where the assessor changes on a parent case but related cases and BAM-C assessments don’t transfer to the new owner, please contact the BOS Help Desk.

If you need to add another assessor, add the assessor as a case party and then contact the BOS Help Desk. They can take steps to ensure the new assessor case party can edit the case.

Reopening a case submitted to a consent authority

BOAMS will not allow an assessor to directly reopen an assessment after the parent case has been submitted.

For a biodiversity stewardship assessment, the Taskforce can reopen and return the case to the assessor.

For a development assessment case where the consent authority (including the department) has been added as a case party to review the case in BOAMS, the relevant consent authority can reopen and return the case to the assessor. To do this, the reviewer selects the ‘Send Back to Assessor’ button on the parent case page. This automatically reverts the status of the parent case back from ‘Submitted’ to ‘In-Progress’. The related case status may still be ‘Finalised’ until the assessor reopens the BAM-C.

For cases where the consent authority does not have access, please contact the BOS Help Desk to request the case be reopened and returned to the assessor.

More information

- Assessor resources
- Biodiversity Offsets Scheme Accredited Assessor Update 48
- Biodiversity Assessment Method (BAM) Calculator User Guide
- Biodiversity Accredited Assessor System (BAAS)
- Biodiversity certification
- Biodiversity Offsets and Agreement Management System
- Biodiversity Offsets Scheme public registers
- Local Land Services Act 2013
- Stewardship Expression of Interest