How to…
Process request to withdraw a Certificate of Occupancy

Government of South Australia
Department for Trade and Investment

PlanSA

Version 1.0

Background

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A request to withdraw a Certificate of Occupancy is notified by an email and delivered to the organisation email address.

Withdrawal request submitted for Certificate of Occupancy 668

Applicant: Test Automation

Address: 162 THE PARADE NORWOOD SA 5067

A Withdrawal request has been submitted for Certificate of Occupancy 668 for Development Application 23001101.

Use the link below to view the request and action the withdrawal

View the Certificate of Occupancy Application.

Included instructions

- **Process Certificate of Occupancy Withdrawal Request**
    - Cancel Withdrawal
    - Confirm withdrawal
    - Refund Fee
- **Endorse the Fee Refund**
    - Endorsing the fee refund
    - Endorser refuses fee refund
- **Acknowledge Refund Endorsement**
- **Initiate another fee refund**

Related instructions

Available from the Certificate of Occupancy | PlanSA guides and instructions:

- How to – Request withdrawal of a Certificate of Occupancy application

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Process Certificate of Occupancy Withdrawal Request

1. Click on **Certificate of Occupancy** within the Assessment dashboard.

2. In **For Your Action** the application shows with a status of 'Pending Withdrawal'.

3. Click on **ID** number to view the application.

Application ID	Certificate ID ↓	Location	Building Work(s)	Initiated	Status	Days
23024096	442	162 THE PARADE NORWOOD SA 5067	Building Work 1	29 Aug 2023	Pending Withdrawal	🕐 -

4. The **Certificate of Occupancy Details** shows with a 'Pending Withdrawal' status.

5. Click **PROCESS WITHDRAWAL OF CERTIFICATE** button.

Certificate of Occupancy: 442

PROCESS WITHDRAWAL OF CERTI…

Summary | Documents | Checklist | Fees | Clocks | Decision | Inspection | Related Actions

❓ Help for this section

‹ Development application 23024096

Certificate of Occupancy Details

Certificate of Occupancy Status   Pending Withdrawal

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6. The **Process Certificate of Occupancy Withdrawal Request** page shows with the 'Applicant Comments' for requesting the withdrawal.

Action Later
Use the **Action Later** option to exit the request, without having to make a decision.

Process Certificate of Occupancy Withdrawal Request

Applicant Comments
Provide a note to the relevant authority advising the reason for requesting the withdrawal of your application.

If you are satisfied that the Applicant intended to withdraw this application, please click 'Confirm Withdrawal'. If there is any doubt about the legitimacy of this request, please contact the Applicant and confirm their intent. If this request was made in error, please click 'Cancel Withdrawal'. Once an Application for issuing a Certificate of Occupancy has been withdrawn it cannot be reinstated. If there is a paid invoice for this application the applicant may be entitled to a refund.

Decision *

--- Select One ---

ACTION LATER   SUBMIT

7. Select your **Decision** to either 'confirm the withdrawal' or 'cancel the withdrawal'.

Cancel Withdrawal

8. Select **Cancel Withdrawal** decision and provide a **Reason for cancelling the withdrawal**; the reason is shared with the applicant.

9. Click **SUBMIT** to complete the request cancellation.

Process Certificate of Occupancy Withdrawal Request

Applicant Comments
Provide a note to the relevant authority advising the reason for requesting the withdrawal of your application.

If you are satisfied that the Applicant intended to withdraw this application, please click 'Confirm Withdrawal'. If there is any doubt about the legitimacy of this request, please contact the Applicant and confirm their intent. If this request was made in error, please click 'Cancel Withdrawal'. Once an Application for issuing a Certificate of Occupancy has been withdrawn it cannot be reinstated. If there is a paid invoice for this application the applicant may be entitled to a refund.

Decision *

Cancel Withdrawal

Reason for cancelling the withdrawal *

Provide a reason for cancelling the request

ACTION LATER   SUBMIT

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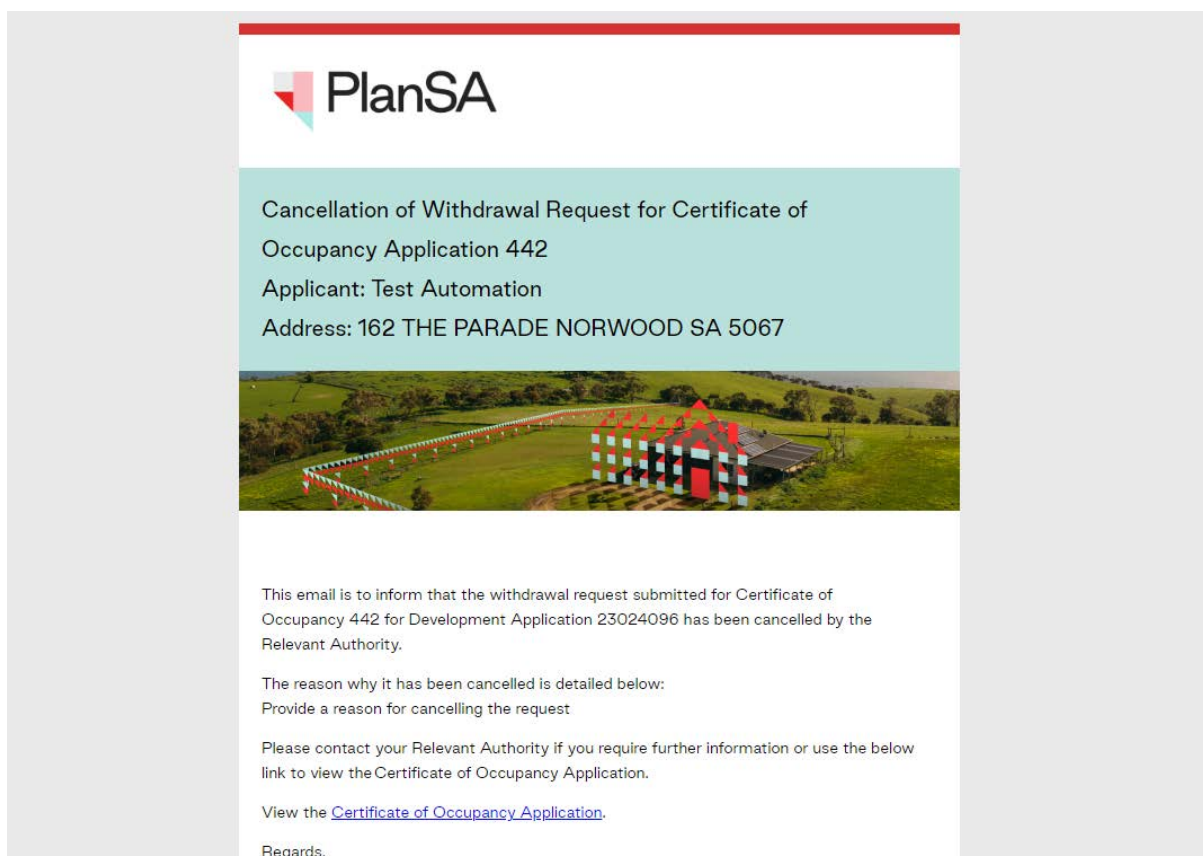Version 1.0

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10. The **Certificate of Occupancy Details** shows the status of the Certificate of Occupancy application prior to the request to withdrawal, for example 'awaiting validation'.
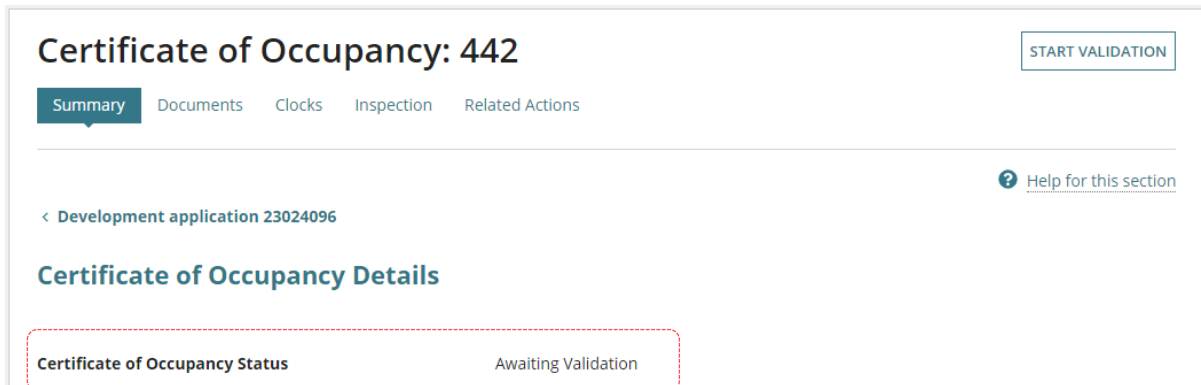
The applicant will receive an email notification or when 'post' is their preferred method of communication, ensure to send them notice of the cancellation which includes the reason for the cancellation.

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Confirm withdrawal

11. Select **Confirm Withdrawal** decision.

12. Click **SUBMIT** to complete the withdrawal request.

Process Certificate of Occupancy Withdrawal Request

Applicant Comments

Write a reason for the withdrawal.

If you are satisfied that the Applicant intended to withdraw this application, please click 'Confirm Withdrawal'. If there is any doubt about the legitimacy of this request, please contact the Applicant and confirm their intent. If this request was made in error, please click 'Cancel Withdrawal'. Once an Application for issuing a Certificate of Occupancy has been withdrawn it cannot be reinstated. If there is a paid invoice for this application the applicant may be entitled to a refund.

Decision *

Confirm Withdrawal ▾

ACTION LATER   SUBMIT

13. Click **Yes** to confirm the withdrawal and acknowledge the application cannot be reinstated.

Once the withdrawal has been processed, the application for the Certificate of Occupancy cannot be reinstated. Do you wish to proceed?

NO   YES

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Refund Fee

The **Determine Fee Refunds for Invoice** page shows following the acknowledgement of the Certificate of Occupancy (CoO) withdrawal and only when validation of the CoO has been completed and the CoO fee paid by the applicant (only relevant to councils).

Refund Not Required

1. Click **REFUND NOT REQUIRED**.

2. The **No actions available** message displays.

3. Click **Summary** tab to view the **Certificate of Occupancy Details** and shows the status updated to 'Withdrawn' and the withdrawal reason.

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Refund fee in full or part

1. Click checkbox against the fee being refunded.

2. The **Amount to Refund** and **Refund Reason** are enabled.
   a. Leave the **Amount to Refund** as the full amount or update to a lesser amount.
   b. Provide a **refund reason** (mandatory).

3. Nominate a **financial approver** to endorse the refund. Noting, only people in your organisation assigned the 'financial approver' role will return in the search results.

Determine Fee Refunds for Invoice #130140

❓ Help for this section

Invoice Fees
Please select and enter a dollar amount and reason for all required items. Ensure items which are not applicable for refunds are deselected.

	Description	Statutory Amount	Subtotal	GST	Refunds	Total Paid	Amount to Refund (GST Inclusive)	Refund Reason
☑	Certificate of occupancy	$54.50	$49.55	$4.95	$0.00	$54.50	$25.00	Only partial refund for

Please nominate a Financial Approver from your organisation to endorse this refund *

EPN TestTwentyThree ✕

REFUND NOT REQUIRED   SUBMIT

4. The **No actions available** message displays.

Certificate of Occupancy: 442

Summary   Documents   Checklist   Fees   Clocks   Decision   Inspection   **Related Actions**

No actions available

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5. Click the **Summary** tab to return to the Certificate of Occupancy details, showing 'Withdrawn' status and the applicant receives an email notification 'confirmation of withdrawal request'.

Certificate of Occupancy: 442

| Summary | Documents | Checklist | Fees | Clocks | Decision | Inspection | Related Actions |

❓ Help for this section

‹ Development application 23024096

Certificate of Occupancy Details

Certificate of Occupancy Status	Withdrawn
Withdrawal reason	Write a reason for the withdrawal.

6. Click on **Fees** to view the Refund – pending endorsement. The financial approver nominated to the endorse the refund receives an email 'A fee refund has been created for application'.

| Summary | Documents | Checklist | Fees | Clocks | Decision | Inspection | Related Actions |

❓ Help for this section

‹ Development application 23024096

All fees raised on this application

⌄ Show fees already raised on this application

Fees raised for this Certificate of Occupancy

Certificate of Occupancy Fee Advice - 130140 (Varied) - Paid on 29/08/2023 ›

Refunds

Invoice #130140 Refund - 29 Aug 2023 - PENDING-ENDORSEMENT ⌄

Refund Reference Number	27
Total Refund Amount	$25.00
Assessment Officer	epn TestTwentyOne
Financial Approver	EPN TestTwentyThree Edit

Refund Items

Description	Refund Reason	Item Subtotal	Item GST	Item Total
Certificate of occupancy	Only partial refund for work already completed	$22.73	$2.27	$25.00

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Endorse the Fee Refund for Financial Approvers

Important! The **Certificate of Occupancy** fee refund and endorsement is performed from the Certificate of Occupancy application; accessible from the development application.

A fee refund has been created for Application #23024096

Applicant: Test Automation

Address: 162 THE PARADE NORWOOD SA 5067

Invoice #130140 for Application #23024096 has had a fee refund raised and you have been nominated as the Financial Approver.

1. Application shows in **For Your Action** with action 'Awaiting Refund Endorsement'.

2. Click on application **ID** to view.

3. The **Development Application Summary** page shows with action 'Respond to endorsement request for refund'.

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4. Click on **Certificate of Occupancy** tab to show the Certificate of Occupancy application.

5. Click on Certificate **ID** with a 'withdrawn' status.

| Summary | Documents | Event History | Land Division Certificates | Sharing access | Building Notifications | Variation Requests | Certificate of Occupancy | Inspection | Related Actions |

Certificate of Occupancy

Certificate ID	Location	Building Work(s)	Description	Initiated	Decision Date	Status
442	162 THE PARADE NORWOOD SA 5067	Building Work 1	Building Work 1	29 Aug 2023		Withdrawn

6. The **Certificate of Occupancy Details** page shows, includes the withdrawal reason.

Certificate of Occupancy: 442

| Summary | Documents | Checklist | Fees | Clocks | Decision | Inspection | Related Actions |

❓ Help for this section

‹ **Development application 23024096**

Certificate of Occupancy Details

Certificate of Occupancy Status	Withdrawn
Withdrawal reason	Write a reason for the withdrawal.

7. Click on **Fees** tab to view the refunds pending endorsement.

8. Expand the **Refund – Pending Endorsement** to view the amount being refunded and the refund reason.

9. Click **Endorse Invoice Refund**.

Refunds

Invoice #130140 Refund - 29 Aug 2023 - PENDING-ENDORSEMENT ⌄

Endorse Invoice Refund

Refund Reference Number	27
Total Refund Amount	$25.00
Assessment Officer	epn TestTwentyOne
Financial Approver	EPN TestTwentyThree Edit

Refund Items

Description	Refund Reason	Item Subtotal	Item GST	Item Total
Certificate of occupancy	Only partial refund for work already completed	$22.73	$2.27	$25.00

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10. Make a choice to endorse the fee advice refund or not.

Endorsing the fee refund

On endorsement of the 'fee refund' an email 'Refund for Invoice' is received by the invoice contact with the *Refund Advice* attached as a PDF.

Refund for Invoice #8092 – Application 23001101

Applicant: Test Automation

Address: 162 THE PARADE NORWOOD SA 5067
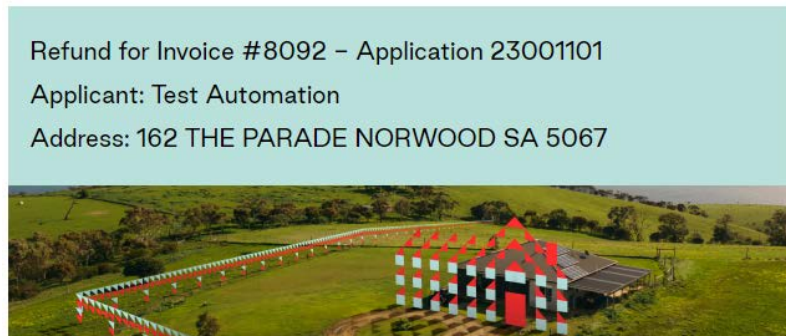
Tax Invoice #8092 for Development Application ID 23001101 has been altered and Refund Advice #77 has been issued.

Please see the attached Refund Advice for further information.

Please use the following links to go to the application.

View the Development Application.

11. Click **Yes** and SUBMIT to complete endorsing the fee refund.

Review and Endorse Fee Refunds for Invoice #8092

Description	Fee Schedule	Subtotal	GST	Amount already Refunded or Pending	Total	Proposed Refund Amount (GST Inclusive)	Refund Reason
Certificate of occupancy	$49.55	$49.55	$4.95	($0.00)	$54.50	$25.00	Only partial refund for work already completed

Do you wish to endorse this fee advice refund? *
- ● Yes
- ○ No

CANCEL   SUBMIT

12. The Refunds record updates to 'ENDORSED' and the 'Refund Advice' generated and available from the document store.

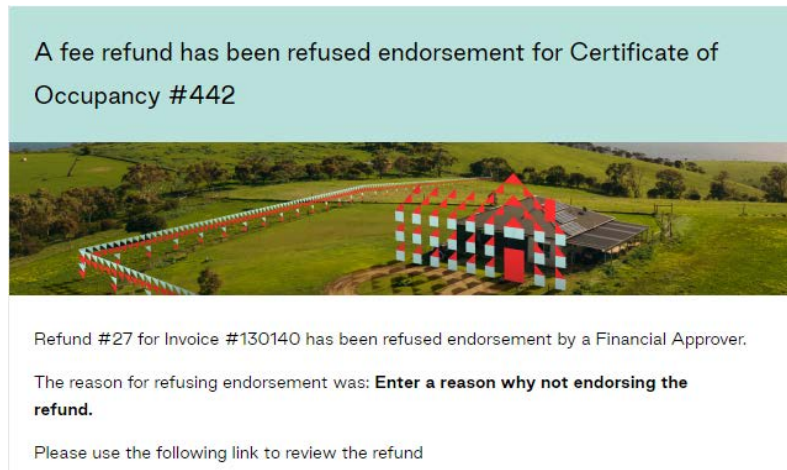**Fees raised for this Certificate of Occupancy**

Certificate of Occupancy Fee Advice - 8092 (Varied) - Paid on 31/08/2023   >

Refunds

Invoice #8092 Refund - 31 Aug 2023 - ENDORSED   >

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Endorser refuses fee refund

On refusing the fee refund (not endorsing) an email 'A fee refund has been refused endorsement for Certificate of Occupancy' is received by the team member who initiated the refund during the withdrawal of the Certificate of Occupancy.

A fee refund has been refused endorsement for Certificate of Occupancy #442

Refund #27 for Invoice #130140 has been refused endorsement by a Financial Approver.

The reason for refusing endorsement was: **Enter a reason why not endorsing the refund.**

Please use the following link to review the refund

13. Click **No** and provide a **reason** for not endorsing the refund.

14. Click **SUBMIT** to complete.

Review and Endorse Fee Refunds for Invoice #130140

Description	Fee Schedule	Subtotal	GST	Amount already Refunded or Pending	Total	Proposed Refund Amount (GST Inclusive)	Refund Reason
Certificate of occupancy	$49.55	$49.55	$4.95	($0.00)	$54.50	$25.00	Only partial refund for work already completed

Do you wish to endorse this fee advice refund? *
○ Yes
● No

Please nominate an Assessment Officer from your organisation *
epn TestTwentyOne ✕

Please specify a reason for not endorsing this refund *

Enter a reason why not endorsing the refund.

CANCEL   SUBMIT

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15. The **Fees** page shows and the Refunds record updates with 'Endorsement-Refused'.

Certificate of Occupancy: 442

| Summary | Documents | Checklist | **Fees** | Clocks | Decision | Inspection | Related Actions |

❓ Help for this section

< **Development application 23024096**

All fees raised on this application

⌄ Show fees already raised on this application
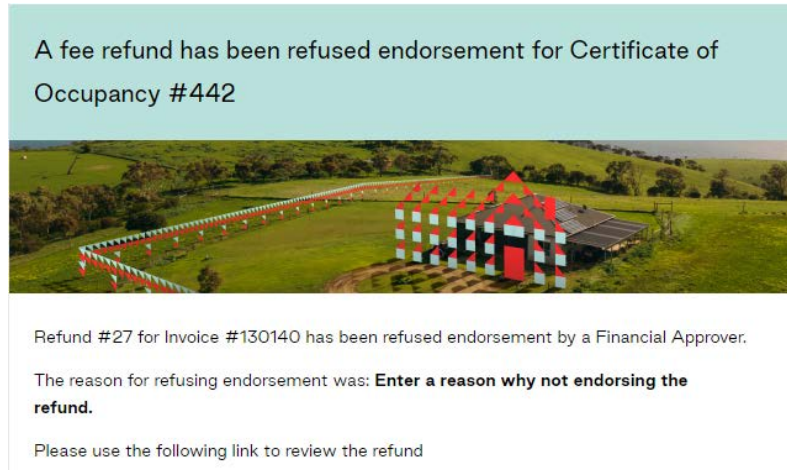
Fees raised for this Certificate of Occupancy

| Certificate of Occupancy Fee Advice - 130140 - Paid on 29/08/2023 | > |

Refunds

| Invoice #130140 Refund - 29 Aug 2023 - ENDORSEMENT-REFUSED | > |

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Acknowledge Refund Endorsement

Upon receiving the email 'A fee refund has been refused endorsement for Certificate of Occupancy', the user who processed the Certificate of Occupancy withdrawal request is required to 'acknowledge the refund endorsement'.

A fee refund has been refused endorsement for Certificate of Occupancy #442

Refund #27 for Invoice #130140 has been refused endorsement by a Financial Approver.

The reason for refusing endorsement was: **Enter a reason why not endorsing the refund.**

Please use the following link to review the refund

1. Click **Certificate of Occupancy** within the ribbon.

2. Search for the Certificate of Occupancy **ID** number.

3. Click on **ID** number to open the Certificate of Occupancy application.

Development application processing

442

Help

FOR YOUR ACTION (5) | WAITING (1) | UNDER APPEAL (0) | REVOKED (0) | COMPLETED (11)

1 results for: "442"

Application ID ↓	Certificate ID	Location	Building Work(s)	Initiated	Status	Days
23024096	442	162 THE PARADE NORWOOD SA 5067	Building Work 1	29 Aug 2023	Withdrawn	⏱ -

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4. The **Certificate of Occupancy Details** page shows.

5. Click on **Fees** tab to view the refund.

6. Expand the Refund with 'Endorsement-Refused' to show option 'Acknowledge Refund Endorsement' and the refusal reason.

7. Click on **Acknowledge Refund Endorsement** to complete the refund refusal.

Fees raised for this Certificate of Occupancy

Certificate of Occupancy Fee Advice - 130140 - Paid on 29/08/2023	>

Refunds

Invoice #130140 Refund - 29 Aug 2023 - ENDORSEMENT-REFUSED	⌄

Acknowledge Refund Endorsement

Refund Reference Number   27

Total Refund Amount $25.00

Assessment Officer   epn TestTwentyOne

Financial Approver   EPN TestTwentyThree

Endorsement Refusal Reason
Enter a reason why not endorsing the refund.

Refund Items

Description	Refund Reason	Item Subtotal	Item GST	Item Total
Certificate of occupancy	Only partial refund for work already completed	$22.73	$2.27	$25.00

Initiate another fee refund

Another fee refund can be initiated from the **Certificate of Occupancy Fee Advice**; expand to show the 'Process Invoice Refund' option, then follow the Refund Fee instructions on page 7.

Fees raised for this Certificate of Occupancy

Certificate of Occupancy Fee Advice - 130140 - Paid on 29/08/2023	⌄

Process Invoice Refund

Payment Reference Number   130140

Certificate of Occupancy ID   442