



How to...

Endorse a fee refund

Background

1

The nominated 'Financial Approver' receives an email notification advising a fee refund has been created and requires endorsement.

Endorsement reassigned

In circumstances where the fee refund endorsement is reassigned to a new financial approver, the initiating staff member will advise of the reassignment outside of the ePlanning system either by email or phone.

Notification of Refund Endorsed

On 'endorsement' of the refund the application's 'invoice contact' will receive an email notification advising a 'tax invoice' has been altered and a 'refund advice' issued. When the preferred method of contact is post, then print the 'refund advice' and send via post.

Included instructions

- [Review the fee refund](#)
- [Option: Endorse the fee refund](#)
- [Option: Refuse the fee refund](#)

Related Instructions

Visit the Support Library page – [Fee invoicing and Payments](#) to view:

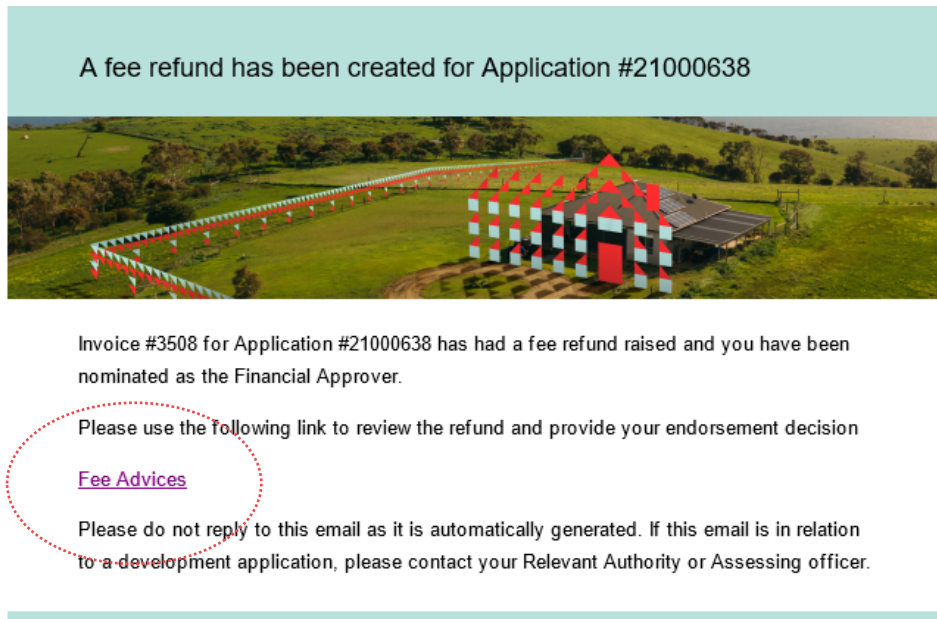
- How to – Initiate a fee refund in full or part
- How to – Acknowledge the financial delegates' refund refusal
- How to – Upload a correspondence document and record the date sent
- How to – Print application fee payment documents (fee advice and tax invoice)



How to... Endorse a fee refund

Review the fee refund

1. Click on the **Fee Advices** link within the email notification.



Alternate method

2. Search using the **ID** of the application from the email notification and uncheck the **Assigned to me only** tick box to view all results.

The application will show the action: 'Respond to Refund Endorsement Request'.

Development application processing

This is the

TRAINING

Submit mandatory building notification

Submit mandatory Re-Inspection notification

FOR YOUR ACTION (61)

ASSESSMENT IN PROGRESS (136)

WAITING (35)

UPCOMING (8)

COMPLETED (76)

BUILDING NOTIFICATIONS

1 results for: "21000638"

Assigned to me only

ID	Owner	Location	Nature of Development
21000638	M Doherty	LOT 45 MILLER ST PENONG SA 5690	House and swimming pool and deck



How to... Endorse a fee refund

3. Click on the application (not the ID) to view the Status detail and then click on **Planning consent** with a status of: 'Assessment in progress'.

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1 results for: "21000638"

Assigned to me only

ID	Owner	Location	Nature of Development	Relevant Authority	Lodged	Status	Days
21000638	M Doherty	LOT 45 MILLER ST PENONG SA 5690	House and swimming pool and deck	State Planning Commission	19 Mar 2021	Assessment in progress	36

STATUS DETAIL CONTACTS SUMMARY

Application 21000638

Planning consent

Assessment in progress

Verification

✓ Completed 19 Mar 2021

Fee Payable

✓ Payment received 19 Mar 2021

4. Click on the **Fees** tab to view the invoice fees.

Information

The 'Fee Advice' hyperlink within the email notification will direct you immediately to the **Fees** tab for the applicable consent (Planning, Land Division, and Building).

5. Expand the **Invoice Refund – Pending Endorsement** to show the details.

A **Postal Correspondence** message displays when the 'primary contact's' or 'invoice contact's' preferred communication method is 'post'.

Summary Documents **Fees** RFIs Referrals Public Notification Conditions and Notes Clocks

< Development application 21000638

All fees raised on this application

Fees raised for this Consent

Lodgement Fee Advice - Planning Consent - 3508 (Varied) - Paid on 19/03/2021

Refunds

Invoice #3508 Refund - 19 Mar 2021 - PENDING-ENDORSEMENT





How to... Endorse a fee refund

6. Click on **Endorse Invoice Refund**.

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Refunds

Invoice #3508 Refund - 19 Mar 2021 - PENDING-ENDORSEMENT

[Endorse Invoice Refund](#)

Refund Reference Number 40

Total Refund Amount \$150.00

Assessment Officer Sascha

Financial Approver Troy [Edit](#)

Refund Items

Description	Refund Reason
Public Notification	public notification is not required
Total Payable Fees	

7. Within the **Review and Endorse Fee Refunds** page, check the amount being refunded and the refund reason to determine whether to endorse the refund or not.

Option: Endorse the fee refund

1. Click on **Yes** and **Submit** to process the refund.

Review and Endorse Fee Refunds for Invoice #3508

Description	Fee Schedule	Subtotal	GST	Amount already Refunded or Pending	Total	Proposed Refund Amount (GST Inclusive)	Refund Reason
Public Notification						\$150.00	public notification is not required

Do you wish to endorse this fee advice refund? *

Yes

No

[Refer to the application Fees and Charges for the current financial year statutory amounts](#)

[CANCEL](#) [SUBMIT](#)

2. The **Fees** page will show the **Invoice Refund** as 'Endorsed'.

Refunds

Invoice #3508 Refund - 19 Mar 2021 - ENDORSEMENT-REFUSED

Invoice #3508 Refund - 19 Mar 2021 - ENDORSED



How to... Endorse a fee refund

Option: Refuse the fee refund

When the fee refund has been refused, the staff member who initiated the refund will receive an email notification advising the 'refusal' including a reason and a prompt (including a 'Consent Refund History' hyperlink) to review the refund.

1. Click on **No** and provide a **Reason** for not endorsing the refund.

The above process can be repeated if the refund amounts need to change based on the endorser's recommendations.

2. Leave the **Nominate an Assessment Officer** as the default option; i.e., the staff member who initiated the refund. As required delete using 'X', and nominate a different staff member.
3. Provide a **reason for not endorsing the refund** and then **Submit** to complete.

Do you wish to endorse this fee advice refund? *

Yes

No

Please nominate an Assessment Officer from your organisation *

Sascha x

Please specify a reason for not endorsing this refund *

Planning Officer issue, is not appropriate to refund for work that has been completed

CANCEL SUBMIT

On completing the endorsement action, you are returned to the **Fees** page, and the Refund status will be updated to either 'Endorsed' or 'Refused' depending on the decision.

Refunds

Invoice #3508 Refund - 19 Mar 2021 - ENDORSEMENT-REFUSED

Invoice #3508 Refund - 19 Mar 2021 - ENDORSED