

# Permit Fee Retention for Work Completed

The Permit Retention fee\* differs from an administrative Refund Processing fee as it is the retention of a portion of the **paid permit fees** for **work already completed**, such as Inspections. The Oregon Standard Model has the Permit Fee Retention broken out into 3 standard percentage rates to assist with this. Additional percentage breakdowns can be configured upon request.

20% Permit fee retention - plumbing

50% Permit fee retention - plumbing

75% Permit fee retention - plumbing

**Note:** Retention of Plan Review fees are not subject to State Surcharge.

1. To process the Permit Fee Retention, go to the Fees tab in the record navigation. Select the applicable permit fees that have been invoiced and paid, and void them to credit if they have not been credited already.

Menu	Add	Delete	Void	Invoice	ReCalc	Help
Fee Calc. Factor:	Job Value(Contractor)\$0.00	Fee Total	\$112.90			
Showing 1-4 of 4						
<input checked="" type="checkbox"/>	Fee Item	Qty	Unit			
<input checked="" type="checkbox"/>	Hose bib	1	Qty			
<input checked="" type="checkbox"/>	Swimming pool piping	1	Ea			
<input checked="" type="checkbox"/>	Balance of minimum permit fees - plumbing	3.8	Automatic			
<input checked="" type="checkbox"/>	State of Oregon Surcharge -Plumb (12% of applicable fees)	100.8	Ea			

Void Fee Item				
Menu	Submit	Reset	Cancel	Help
Reason	Comments			
Other - please provide comment	Fee retention			
	<small>check spelling</small>			

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2. The click the Add fee button.

Menu	<b>Add</b>	Delete	Void	Invoice	ReCalc	Help
<small>Fee Item Hose bib, Swimming pool piping, Balance of minimum permit fees - plumbing, State of Oregon Surcharge -Plumb (12% of applicable fees) voided successfully.</small> Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total \$0.00 Showing 1-4 of 4						
<input type="checkbox"/> Fee Item	Qty	Unit	Fees	Status	Balance Due	
<input type="checkbox"/> Hose bib	1	Qty	\$35.00	CREDITED	\$0.00	
<input type="checkbox"/> Swimming pool piping	1	Ea	\$62.00	CREDITED	\$0.00	
<input type="checkbox"/> Balance of minimum permit fees - plumbing	3.8	Automatic	\$3.80	CREDITED	\$0.00	
<input type="checkbox"/> State of Oregon Surcharge -Plumb (12% of applicable fees)	100.8	Ea	\$12.10	CREDITED	\$0.00	

3. Locate the Permit Fee Retention with the percentage of the permit fees you plan on retaining.
4. Enter the total amount of permit fees in the Quantity Box, that were paid and are eligible to be potentially refunded, **excluding previously paid State Surcharge**.

20% Permit fee retention - plumbing	<input type="text"/>	Amount
50% Permit fee retention - plumbing	<input type="text" value="100.80"/>	Amount
75% Permit fee retention - plumbing	<input type="text"/>	Amount

5. Click Submit – the Permit Retention fee will calculate the percentage at the rate you selected and will automatically recalculate State Surcharge at 12% of what is being retained. Invoice the new Permit Fee Retention and State Surcharge fee items.

Menu	Add	Undo	Delete	Void	<b>Invoice</b>	ReCalc	Help
<small>Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total \$56.45</small> Showing 1-6 of 6							
<input type="checkbox"/> Fee Item	Qty	Unit	Fees	Status	Balance Due		
<input type="checkbox"/> Hose bib	1	Qty	\$35.00	CREDITED	\$0.00		
<input type="checkbox"/> Swimming pool piping	1	Ea	\$62.00	CREDITED	\$0.00		
<input type="checkbox"/> Balance of minimum permit fees - plumbing	3.8	Automatic	\$3.80	CREDITED	\$0.00		
<input checked="" type="checkbox"/> 50% Permit fee retention - plumbing	100.8	Amount	\$50.40	NEW	\$50.40		
<input type="checkbox"/> State of Oregon Surcharge -Plumb (12% of applicable fees)	100.8	Ea	\$12.10	CREDITED	\$0.00		
<input checked="" type="checkbox"/> State of Oregon Surcharge -Plumb (12% of applicable fees)	50.4	Ea	\$6.05	NEW	\$6.05		

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- Go to the Payment tab. Note that you now have unapplied fees, from voiding the permit fees to credit, in the Amount Not Applied. Checkbox the source payment in the Transactions section that shows a Not Applied balance (transactions appear at the bottom of the Payment screen). Select the Apply button to now reapply these monies.

Pay
Apply
Refund
Void
Generate Receipt
Fund Transfer
Reports ▾
Help

**Total Invoice Amount:** \$56.45

**Total Payment:** \$112.90

**Total Balance:** \$56.45 Cr

**Amount Not Applied:** \$112.90

**Terminal #:**

**Cashier ID:** STHIAS

**Date:** 03/07/2019

**Invoices**

Invoice #	Amount	Paid in Full
16	\$112.90	Y
17	(\$112.90)	
18	\$56.45	N

**Transactions**

Transaction Code	Transactions	Method	Receipt #	Not Applied	Amount	Status
<input checked="" type="checkbox"/>	Payment	Cash	14	\$112.90	\$112.90	Paid

- Apply the monies to the Permit Fee Retention and the State Surcharge that are showing an outstanding balance. Consider paying any other fees that still show an outstanding balance if the work has already been performed – if it is not appropriate to pay any other remaining unpaid fee items, void them prior to beginning the next step in the Fees tab to show they are no longer applicable.

Menu ▾
Submit
Full Pay
Reset
Cancel
Help

Amount Not Applied: \$112.90

Invoice #	Priority	Payment Period	Fee Code	Fee Item	Quantity	Fee	Paid	Outstanding	Amount
<input type="checkbox"/>	18	STANDARD	B_ST_SRCHGPL	State of Oregon Surcharge -Plumb (12% of applicable fees)	50.4	\$6.05	\$0.00	\$6.05	6.05
<input type="checkbox"/>	18	STANDARD	B_PLM_986	50% Permit fee retention - plumbing	100.8	\$50.40	\$0.00	\$50.40	50.40
<b>Total</b>									56.45

The Amount Not Applied balance that is remaining is what is then eligible for the agency to refund to the customer.

Refer to *How to complete a Refund* documentation on Kayako:  
<http://orepermittinghelp.kayako.com/Knowledgebase/Article/View/15>