

Permit Refund Process

Contractor requesting refund:

If the person requesting the refund is the contractor, they will need to submit a refund letter. It is required to be submitted on the contractor's company letterhead (the contractor of which the permit belongs to) and their signature. If the company does not have a company letterhead, then a scanned copy of a business card is acceptable and the refund letter may be typed on the document. The refund letter should include the reason for the permit refund, the permit number that is being refunded. If it is a duplicate permit, please list the permit number that you are working under.

Homeowner requesting refund:

If the person requesting the refund is the homeowner, they will need to submit a refund letter with their name, address, phone number, and signature. The refund letter should include the reason for the permit refund, the permit number that is being refunded. If it is a duplicate permit, please list the permit number that you are working under.

The refund letter can be mailed, faxed, emailed, or hand delivered to the office. Faxed refund letters are preferred. Refunds are usually processed in about a week, sometimes quicker. If you paid for the permit by a credit or debit card, it will take a little longer to receive the refund.

Please allow three to six weeks for your refund. Refund requests and questions should be submitted to Rebecca Gearren.

Rebecca Gearren

Office: 336-747-7425

Fax: 336-727-2792

Email: rebeccag@cityofws.org

Mailing address:

City of Winston-Salem, Inspections Division

Attn: Rebecca Gearren

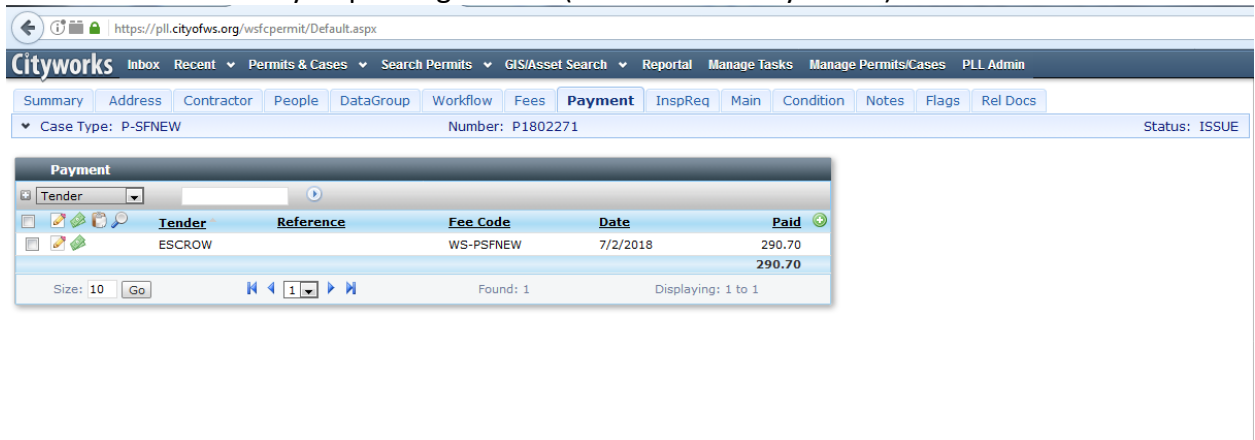
100 E. 1st Street, Suite 328

Winston-Salem, NC 27101

Step By Step Refund Process

Receive the request. Check that all the required information is on the request (letterhead or business card, permit number, reason why, date, and signature).

1. Upload permit in CityWorks. Check for completed inspections and why they need the refund. Use best judgment in issuing refunds- how long has the permit been open? Was the reason for the refund due to office staff or customer error?
2. While on Permit in CityWorks, go to the Payment tab. If the tender type is ESCROW, the permit was paid by bond and will be refunded to the bond account. If the tender type is INOVAH, the permit was paid with a credit card or cash and money will be refunded by requesting a check (this is handled by Onnie).



The screenshot shows the Cityworks interface for permit P1802271. The 'Payment' tab is active, displaying a table with one payment record:

Tender	Reference	Fee Code	Date	Paid
ESCROW		WS-PSFNEW	7/2/2018	290.70
				290.70

Navigation controls at the bottom show 'Size: 10', 'Go', 'Found: 1', and 'Displaying: 1 to 1'.

3. On the Payment tab, click the Cash symbol beside the Tender type. If you hover over the symbol, it will display Refund this Payment. Refund the full amount paid with notes specific to why the permit is being refunded.



The screenshot shows the Cityworks interface for permit P1800202. The 'Payment' tab is active, displaying a table with three payment records:

Tender	Reference	Fee Code	Date	Paid
ESCROW		WS-PLMXTRA	4/10/2018	40.00
ESCROW		WS-PLMXTRA	4/4/2018	40.00
<input checked="" type="checkbox"/> ESCROW		F-PSFNEW	1/23/2018	166.23
				246.23

Navigation controls at the bottom show 'Size: 10', 'Go', 'Found: 3', and 'Displaying: 1 to 3'.

Below the table is the 'Add Payment Refund' dialog box for the selected payment (F-PSFNEW, Payment: 166.23). The 'Refund' amount is set to 166.23. The 'Comments' field contains the following text:

CONTRACTOR REQUESTING REFUND DUE TO PERMIT DUPLICATE: WILL BE USING P1800216 REFUND 221.23 AND WILL BE KEEPING 25.00 FOR REFUND FEE R/G 7/3/18

The dialog box has 'Save' and 'Cancel' buttons at the bottom right.

4. Go to the Fees tab in Cityworks. All fees that were applied originally should show as 'not paid'. Click the checkbox to waive the original permit fees. Then add Construction

Permit Refund Fee (\$25). If permit is being refunded to a bond, the refund fee is applied to ESCROW. If the refund is going to be handled by requesting a check, you apply the refund fee to Tender type: REFUND.

Summary Address Contractor People DataGroup Workflow **Fees** Payment InspReq Main Condition Notes Flags Rel Docs

Case Type: P-MFNEW Number: P1801245 Status: VOID

Code	Fee Description	Amount	Paid
WS-CREFUND	Construction Permit Refund Fee	25.00	25.00
WS-MINTRDE	Minimum Trade	65.00	0.00
WS-PMFAPT	Plumbing Res Multi-Family Apt	0.00	0.00
WS-PMFDUP	Plumbing Duplex Fee	0.00	0.00
WS-PMFTWN	Plumbing Res Multi-Family New	0.00	0.00
		25.00	25.00

Size: 10 Found: 5 Displaying: 1 to 5

- On Summary tab, print the Permit Refund report. Attach the report to the refund request and file in the folder at Record’s Specialist Desk.

If it is refunded to a bond, file immediately.

If you are requesting a check, fill out the ‘Check Request Form’ and attach it to the Permit Refund report and the permit refund request and give to Onnie. Onnie to submit the request and she will return these forms; file at the Records Specialist Desk upon receipt. The folders are organized by permit type.

Record refunded permit numbers in G-Drive.

G Drive>inspections>LESIAS WORK ORIG> REFUNDS(excel).