

Settlement Services Client Reference Guide

CITEC Confirm

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1 Getting Started

Access to Settlement Services must be enabled for your CITEC Confirm account before you can use the system. To request access, please complete our **Request for Access form** which can be found at:

<http://www.confirm.citec.com.au/citecConfirm/help/forms/settlement-services-access.pdf>

Once you have completed the application form, click the 'Submit via Email' button at the base of the form to submit your request.

Note: The following details will be required in order to enable access for your account:

- ▶ CITEC Confirm Account code
- ▶ Company Name
- ▶ Contact Name
- ▶ Email address for the account
- ▶ Phone Number
- ▶ Postal Address

An Invoiced account with CITEC Confirm is a requirement to be granted access to these services.

If you are unsure whether your CITEC Confirm account is Invoiced or Pre-Pay, or you would like to set up an invoiced account, please contact the Confirm Service Centre on 1800 773 773 or confirm@citec.com.au

National Settlement Services are available on the CITEC Confirm main menu under **Property Conveyancing and Settlements**.

View Menu By Product

[View Menu by State](#)

Land Searches

- ▶ [ACT Land Searches](#)
- ▶ [NSW Land Searches](#)
- ▶ [NSW Office of State Revenue Certificates](#)
- ▶ [NT Land Searches](#)
- ▶ [QLD Contaminated Land Search](#)
- ▶ [QLD Land Searches](#)
- ▶ [QLD Land Tax Certificates](#)
- ▶ [QLD Valuation and Sales](#)
- ▶ [SA Land Searches](#)
- ▶ [TAS Land Searches](#)
- ▶ [Telco Cable Search](#)
- ▶ [VIC Land Searches](#)
- ▶ [WA Land Searches](#)

Property Conveyancing and Settlements

- ▶ [National Settlement Services](#)
- ▶ [QLD Property Certificates](#)
- ▶ [QLD Transport & Main Roads Property Search](#)
- ▶ [VIC Conveyancing](#)
- ▶ [VIC Property Sales History Report](#)

Corporate and Individual Searches

- ▶ [ASIC and Business Name Searches](#)
- ▶ [Commercial Enquiries](#)
- ▶ [National Bankruptcy](#)
- ▶ [PPSR - Personal Property Securities Register](#)
- ▶ [QLD Bills of Sale Search](#)

Vehicle Searches and Lodgements

- ▶ [QLD Motor Vehicle Register](#)
- ▶ [REVS - Register of Encumbered Vehicles](#)

Court eFiling

- ▶ [QCAT - QLD Civil and Administrative Tribunal eFiling](#)
- ▶ [QLD Magistrates Court eFiling](#)
- ▶ [VIC County Court eFiling](#)
- ▶ [VIC Magistrates Court eFiling](#)
- ▶ [VIC Supreme Court eFiling](#)
- ▶ [QCAT - Neighbourhood Disputes Registry Search \(Tree and Fence\)](#)

Police Searches

- ▶ [VIC Crime Reports](#)

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Search Your Settlement Bookings](#)
- [Bookings Calendar](#)

Account Services

- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)

From the **National Settlements Services Menu** you can create settlement bookings, search and view your existing settlement bookings, lodge settlement notices (QLD), retrieve any search results stored in intelli-Doc, and access the PEXA platform (you must be registered as a subscriber with PEXA).

1.1 Create User Profile ID – 3 tier logins only

Note: This section only applies to users with 3 tier CITEC Confirm logins

If you log in to the Confirm website with an account-code, userid and password then you will need to create a User Profile.

All other users - skip to next section [Create Settlement Booking](#)

Account & User-ID Login

Account Code :

Userid :

Password :

Login

Unauthorised Access Prohibited.

By clicking the Login button you are agreeing to our
Terms and Conditions.

If you have a Confirm UserID then the **Create User Profile** Screen will display the first time you select any of the menu items under the **National Settlement Services** menu.

Providing your details ensures that our Settlements team can contact you regarding your settlement, and that any documents are returned to the correct postal address.

Your User Profile details will be stored against a Profile ID which will be a combination of the prefix 'CNF' and your CITEC Confirm User ID.

To Create a User Profile, complete the mandatory fields marked with an * asterisk as a minimum.

Create User Profile

Please register your contact details. These details will be used to contact you with enquiries regarding your orders.

Please take care: these details will be used every time you access Settlement Services. Your Profile Id is used to track orders and retrieve results. For assistance, contact the Confirm Service Centre on 1800 773 773.

* indicates mandatory fields.

Profile Details

Profile Id	cnf <input type="text" value="smithj"/>	* Your Profile Id will start with 'cnf'.
Company Name	<input type="text"/>	*
Contact Name	<input type="text"/>	*
Email	<input type="text"/>	*
Email Results	<input checked="" type="checkbox"/> Please email me a copy of my search results.	
Phone	<input type="text"/>	*
Fax	<input type="text"/>	

Address Details

Postal Address	<input type="text"/>	* eg. 1 Smith St, PO BOX 1000
Suburb	<input type="text"/>	*
State	<input type="text" value="Select ..."/>	*
Postcode	<input type="text"/>	*
DX	<input type="text"/>	
DX Suburb	<input type="text"/>	

The **Email Results** checkbox is selected by default. Any search results and documents uploaded to intelli-Doc will be emailed to the email address provided in your User Profile.


Once you have entered your details click **Submit**; the Confirm Profile Details screen will display.

To go back and amend any details click **Edit**, otherwise click **Yes, these details are correct** to complete your User Profile.

Confirm Details

Please confirm your details are correct before proceeding with your order.

Profile Id	cnfsmithj
Company Name	Confirm Test
Contact Name	John Smith
Email	john.smith@email.com
Email Results	Yes
Phone	07 1234 5678
Fax	none supplied
Postal Address	PO Box 123
Suburb	Brisbane
State	QLD
Postcode	4001
DX	none supplied
DX Suburb	none supplied

 Edit

✓ Yes, these details are correct


Once your User Profile has been set-up you will progress to the settlement service that you selected.

Whenever you log in to CITEC Confirm and select a service under the **National Settlement Services Menu**, the Confirm User Details screen will display once for the session, so that you can check your Profile details are still current.


If the details are current and accurate, click **Yes, these details are correct** to proceed.


Confirm Details

Please confirm your details are correct before proceeding with your order.

 If these details are incorrect, please contact the Confirm Service Centre on 1800 773 773.

Profile Id	cnfsmithj
Company Name	Confirm Test
Contact Name	John Smith
Email	john.smith@email.com
Email Results	Yes
Phone	07 1234 5678
Fax	none supplied
Postal Address	PO Box 123
Suburb	Brisbane
State	QLD
Postcode	4001
DX	none supplied
DX Suburb	none supplied

 Edit

 Yes, these details are correct

To update your User Profile details contact the Confirm Service Centre on 1800 773 773, so the details can be updated immediately. Once the update has been made, you will need to close this window and go back to the Settlement Services menu to ensure that your updated details are applied as you pass through to the selected settlement service.

2 Create Settlement Booking

To book a settlement, click **Create a Settlement Booking** from the National Settlement Services Menu.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Search Your Settlement Bookings](#)
- [Bookings Calendar](#)


Account Services


- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)

The **Create Booking** input screen will open in a new window, and the **General** tab will be displayed. You can maximise the window if required to view all the input fields, and use the scroll bars located at the right-hand side and bottom of the screen to move the screen.

 **intelli-Link™**
Create Booking

 [Register](#) [Log in](#)

[Submit](#) [Cancel](#) [Create Booking](#)

Documents Received?: No
Status:

General **Instructions**

Engagement

Customer* Confirm

Contact Name* Your Name

Phone* 07 0000 0000 [Call](#)

Mobile

Email* johnc@lawfirm.com.au

- ☒ Send Order Confirmation
- ☐ Send Docs Received Confirmation
- ☒ Send Settlement Confirmation
- ☐ Also CC Settlement Confirmation To:

Matter / Office Ref* JC/HJ/12345600/15

Other Details

Settlement Booking

State/Region* QLD - Brisbane CBD

Location* GlobalX, West Tower, Level 6, 41

Or Other*

Settlement Type* Purchase

Acting For* Purchaser

Date/Time* 27/11/2015 13:00

Settlement

Purchaser Harry Jones

Purchase Price 735000

Address 14 Jones Road

Suburb/Postcode Red Hill 4059

Additional Services

☒ Lodgement ☒ Final Search

☐ Bank Monies ☐ Collections/Deliveries

☒ Stamping ☐ Land Tax Clearance

☐ Express Post

Title Reference(s) 12345600
(Use commas to separate multiples)

Details from your Profile will be auto-filled in the Contact Name, Phone and Email fields onscreen. Other mandatory fields are marked with an * asterisk.

Enter your reference for this settlement in the Matter/Office Ref field – this reference will be recorded in the CITEC Confirm usage report for this transaction when it is billed.

Note: Settlement services are billed to your Confirm account once the settlement has been completed.

You can request to be sent email notifications at various stages of your order. If **Send Settlement Confirmation** is selected you will automatically receive an email notification when your matter is settled. You can also enter additional email addresses to be cc'd, to notify other parties that the matter has settled.

To request additional services including Stamping, Lodgement or a Final Search use the check boxes under Additional Services.

Once you have entered all the information required to book your settlement, click **Submit** on the top left of the screen.

2.1 Instructions

The Instructions tab allows you to enter your instructions for the settlement and then generate a coversheet to attach with your documents.

The screenshot displays the 'intelli-Link™' interface for 'View/Edit Booking 13720'. The top navigation bar includes the 'PEXA' logo and 'Register' and 'Log in' buttons. Below the header, there are buttons for 'Submit', 'Cancel', 'Delete', 'Print', and 'Create Booking'. The 'Submit' button is highlighted with a red border. To the right, it indicates 'Documents Received?: No' and 'Status: Confirmed'. The main content area features a tabbed interface with 'General', 'Instructions', 'Billing', 'History', and 'Agent Details'. The 'Instructions' tab is active, showing an 'Instruction Sheet' section. This section contains a text area with the instruction 'You may fill in these details at a later time.' and five input fields with dropdown arrows: 'Other Attending Parties:', 'Handover:', 'Collect:', 'Cheques Required:', and 'Other Instructions:'.

Note: If you have your own instructions template/letterhead then you can continue to use it. Simply attach your settlement instructions to the documents being provided for settlement and send via post or DX.

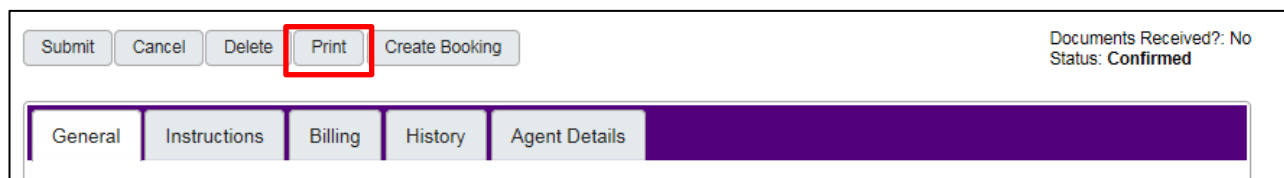
Enter any details on the free text fields provided and click **Submit** on the top left of the screen.

If your settlement instructions change, please contact the Confirm Service Centre on 1800 773 773 or via email at confirm@citec.com.au

Note: For any changes on the day of settlement please contact the Confirm Service Centre on 1800 773 773. The Service Centre will transfer you through to the settlements team to enable any last minute changes to be communicated to the assigned settlement clerk.

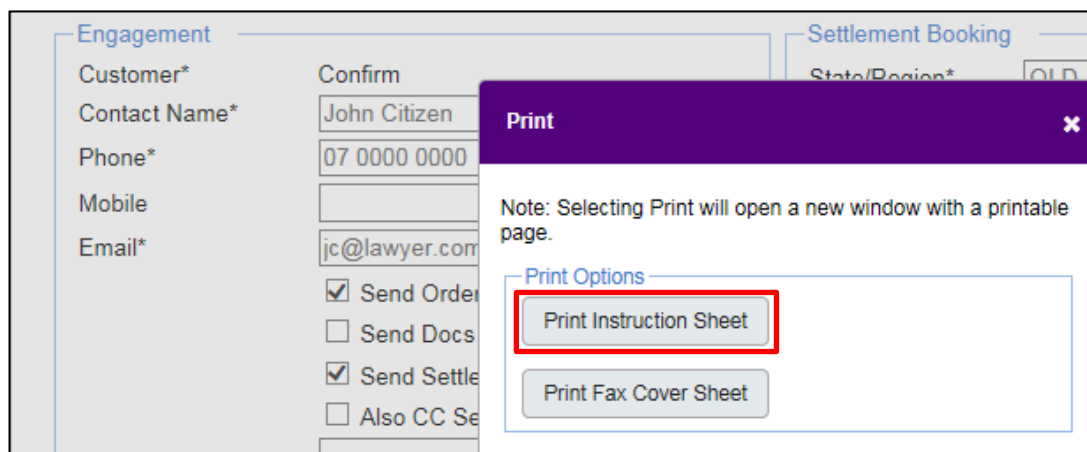
2.2 Print Settlement Coversheet

Once your order has been successfully submitted you can print your coversheet by selecting **Print**.



The screenshot shows a top navigation bar with buttons: Submit, Cancel, Delete, Print (highlighted with a red box), and Create Booking. To the right, it says 'Documents Received?: No' and 'Status: Confirmed'. Below the buttons is a tabbed interface with tabs: General, Instructions, Billing, History, and Agent Details. The 'General' tab is currently selected.

A window will display, click **Print Instruction Sheet**, the coversheet will open in a new window.



The screenshot shows the 'Engagement' form with fields for Customer*, Contact Name* (John Citizen), Phone* (07 0000 0000), Mobile, and Email* (jc@lawyer.com). There are checkboxes for 'Send Order', 'Send Docs', 'Send Settle', and 'Also CC Se'. A 'Print' dialog box is open, showing a note: 'Note: Selecting Print will open a new window with a printable page.' Below the note are 'Print Options' with two buttons: 'Print Instruction Sheet' (highlighted with a red box) and 'Print Fax Cover Sheet'.

Print and attach the Instruction Sheet to your documents to send to our Settlements partner, GlobalX.

The postal address is located on the bottom left of the Instruction Sheet.

Example of Settlement Instruction Sheet:

Settlement		GLOBALX
Order No: 2355500 Matter/Office Ref: File for 123 Acting For: Mortgagee Type: Purchase Date: 29/05/2015 Time: 13:00 Location: GlobalX - 7/440 Collins St		Contact Name: Your name Phone: Your Phone Number, Fax: Email: YourEmail@Email.com.au Address: level 11 / 459 Little Collins Street Melbourne VIC 3000
Additional Service		
<input checked="" type="checkbox"/> Lodgement	<input checked="" type="checkbox"/> Final Search: 123/4567	<input checked="" type="checkbox"/> Stamping
<input type="checkbox"/> Collection/ Delivery	<input checked="" type="checkbox"/> Bank Monies	<input type="checkbox"/> Land Tax Clearance
<input type="checkbox"/> Express Post	<input type="checkbox"/> Fax order on Agent	
Parties Attending		
Westpac Bank are attending as discharging mortgagee		
Handover		
Please hand over documents		
Collect		
Collect documents and cheques		
Other Instructions / Details		
File has been sent to GlobalX's DX address Please call when settlement has been completed and hold documents in your office and I will collect in the afternoon		
Cheques Required		
Please print this sheet and attach to the documents to be sent to		For Office Use
GLOBALX LEGAL SOLUTIONS		Service Code: _____
PO Box 159 Collins Street West VIC 8007		Settled By: _____
Phone: 13 5669, Fax: 03 9670 8644		Advised: _____
7/440 Collins Street		Documents Returned _____
DX: 285 MELBOURNE		






2.3 Amend/Edit your settlement booking

You can amend/edit your settlement booking online up to the day before settlement.



Access your existing settlement bookings via **Search your Settlement Bookings** and the **Bookings Calendar** on the National Settlement Services Menu.

National Settlement Services Menu







Settlement Booking and Tracking

-  [Create a Settlement Booking](#)
-   [Search Your Settlement Bookings](#)
-   [Bookings Calendar](#)

Account Services

-   [Request Access to Settlement Services](#)

Other Settlement Services

-   [View My Results \(intelli-Doc\)](#)
-  [QLD Settlement Notice Lodgement](#)
-  [NSW EDR Stamping and Confirmation](#)
-   [Create a Client VOI Booking](#)

Note: For any changes on the day of settlement please contact the Confirm Service Centre on 1800 773 773. The Service Centre will transfer you through to the settlements team to enable any last minute changes to be communicated to the assigned settlement clerk.

3 Search Your Settlement Bookings

To search for a settlement booking, select **Search your Settlement Bookings** from the National Settlement Services Menu.

National Settlement Services Menu

Settlement Booking and Tracking

- Create a Settlement Booking
- Search Your Settlement Bookings**
- Bookings Calendar


Account Services


- Request Access to Settlement Services

Other Settlement Services

- View My Results (intelli-Doc)
- QLD Settlement Notice Lodgement
- NSW EDR Stamping and Confirmation
- Create a Client VOI Booking

The **Settlement Bookings** search screen will display. Enter your search criteria to search for your existing bookings. Click **Apply Filter** to conduct the search of your settlement bookings.

 **intelli-Link™**
Settlement Bookings

 [Register](#) [Log in](#)

Create BookingCalendar ViewPrintRefresh

Booking Date -
From: 13/11/2015To: 30/11/2015
Containing Text:
Docs Received? All
For User: Me


Status: AnyRegion: Any

Apply Filter


Order No.	Matter	Status	Booking Time	Location	Type	Docs Recd	Comment From Agent	Billed Time	Contact Name	Created By
13720	Test Settlement	Confirmed	25/11/2015 14:00	GlobalX, West Tower, Level 6, 410 Ann Street, Brisbane	Purchase with an Incoming Mortgage	No			Amanda Ford	cnfforda

Any settlement bookings that match your search criteria will display.

Click the **Order No.** link in the results table to view the details of your booking. On the View/Edit Booking screen you can update any details and then click **Submit** to complete your changes.

**intelli-Link**TM

View/Edit Booking 13720

 [Register](#) [Log in](#)

[Submit](#) [Cancel](#) [Delete](#) [Print](#) [Create Booking](#)

Documents Received?: No
Status: **Confirmed**

GeneralInstructionsBillingHistoryAgent Details

Engagement

Customer*

Confirm

Contact Name*

John Citizen

Phone*

07 0000 0000

[Call](#)

Mobile

Email*

jc@lawyer.com.au

☒ Send Order Confirmation

☐ Send Docs Received Confirmation

☒ Send Settlement Confirmation

☐ Also CC Settlement Confirmation To:

Matter / Office Ref*

Test Settlement 1

Other Details

Settlement Booking

State/Region*

QLD - Brisbane CBD

Location*

GlobalX, West Tower, Level 6, 41

Or Other*

Settlement Type*

Purchase with an Incoming Mortg

Acting For*

Purchaser

Date/Time*

25/11/2015

14:00

Settlement

Purchaser

John Smith

Purchase Price

735000

Address

14 Citizen Road

Suburb/Postcode

Red Hill

4059

Additional Services

☒ Lodgement

☐ Final Search

☐ Bank Monies

☒ Stamping

☐ Collections/Deliveries

☐ Land Tax Clearance

☐ Express Post

Title Reference(s)

12345600

x

(Use commas to separate multiples)

4 Settlement Bookings Calendar

To view your settlement bookings in calendar view, select **Bookings Calendar** from the National Settlement Services Menu.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Search Your Settlement Bookings](#)
- [Bookings Calendar](#)


Account Services


- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)

The Calendar will display. Maximise the window to view all the input fields; you can use the scroll bars located at the right-hand side and bottom of the screen to move the screen, if required.





Register
Log in

today
Jump to Day
Refresh

month
week
day

November 2015

Mon	Tue	Wed	Thu	Fri
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
Add new booking	Add new booking	Add new booking	Add new booking	Add new booking
23	24	25	26	27
Add new booking	Add new booking	14:00 13720 Test Settlement 1 @ GlobeK West Tower, Level 6, 410 Ann Street, Brisbane	Add new booking	Add new booking
30	1	2	3	4
Add new booking	Add new booking	Add new booking	Add new booking	Add new booking
7	8	9	10	11
Add new booking	Add new booking	Add new booking	Add new booking	Add new booking

Legend

- Your order is incomplete and has not yet been submitted to an agent.
- Your order is with the agent and being processed.
- Your order is complete.

From this screen you can:

- ▶ Access your settlement bookings and make amendments.
- ▶ View the calendar by month, week or day using the button on the top right of the screen.
- ▶ Create a new booking by clicking on **Add new booking** on the settlement date you require.

Refer to the Legend underneath the calendar for the status colour definitions of the booking entries.
To view a settlement booking, click on the entry in the calendar. The **View/Edit Booking** screen will display.

The screenshot shows the 'View/Edit Booking 13720' interface. At the top left is the 'intelli-Link' logo. At the top right is the 'PEXA' logo with 'Register' and 'Log in' buttons. Below the logo is the title 'View/Edit Booking 13720'. A row of buttons includes 'Submit', 'Cancel', 'Delete', 'Print', and 'Create Booking'. On the right, it says 'Documents Received?: No' and 'Status: Confirmed'. A tabbed interface at the top has 'General', 'Instructions', 'Billing', 'History', and 'Agent Details'. The 'General' tab is active, showing two main sections: 'Engagement' and 'Settlement Booking'. The 'Engagement' section includes fields for 'Customer*' (Confirm), 'Contact Name*' (John Citizen), 'Phone*' (07 0000 0000), 'Mobile', 'Email*' (jc@lawyer.com.au), checkboxes for 'Send Order Confirmation', 'Send Docs Received Confirmation', 'Send Settlement Confirmation', and 'Also CC Settlement Confirmation To:', 'Matter / Office Ref*' (Test Settlement 1), and 'Other Details'. The 'Settlement Booking' section includes dropdowns for 'State/Region*' (QLD - Brisbane CBD), 'Location*' (GlobalX, West Tower, Level 6, 41), 'Or Other*', 'Settlement Type*' (Purchase with an Incoming Mortgage), 'Acting For*' (Purchaser), and 'Date/Time*' (25/11/2015, 14:00). Below this is the 'Settlement' section with fields for 'Purchaser' (John Smith), 'Purchase Price' (735000), 'Address' (14 Citizen Road), and 'Suburb/Postcode' (Red Hill, 4059). At the bottom is the 'Additional Services' section with checkboxes for 'Lodgement', 'Bank Monies', 'Stamping', 'Land Tax Clearance', 'Express Post', 'Final Search', and 'Collections/Deliveries', and a 'Title Reference(s)' field (12345600).

You can return to your settlement booking and add or amend the details at any time up to the day before settlement.

5 View my Results (intelli-Doc)

You can retrieve search results associated with your settlement booking, and documents associated with your QLD settlement notice lodgement from intelli-Doc.

For example, if you request a final search with your settlement booking, the search result will be available in intelli-Doc, once the search has been conducted on the day of settlement.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Search Your Settlement Bookings](#)
- [Bookings Calendar](#)

Account Services

- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)

To access intelli-Doc select **View My Results (intelli-Doc)** from the National Settlement Services Menu. The intelli-Doc screen will display.

intelli-Doc

Shared View: Just Mine

Custom Range

25/10/2015 to 13/11/2015

Email Save Clear

Keyword...

Filter

<input type="checkbox"/>	File Reference	Date	Document Details	Status
<input type="checkbox"/>	test sett notice email	05/11/2015 04:30 PM	QLD Settlement Notices 10075674:guideline-amendments-to-the-privacy-act-1988-a-guide-for-agencies_20151105043050.pdf	Complete
<input type="checkbox"/>	Test Settlement 1	05/11/2015 04:13 PM	QLD Settlement Notices 10075673:privacy-fact-sheet-17-australian-privacy-principles_2_20151105041321.pdf	Complete

10 items per page

1 - 2 of 2 items

Search by File Reference

Enter File Reference...

Show docs by File Reference

test sett notice email

Test Settlement 1

You can search for documents using the date range, Keyword and File Reference search fields.

Documents in intelli-Doc can be emailed or saved to another location using the **Email** and **Save** buttons.

6 QLD Settlement Notice Lodgement

For QLD properties, a settlement notice may be lodged prior to settlement, this service can be accessed through the National Settlement Services Menu.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
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Account Services

- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
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- [Create a Client VOI Booking](#)

6.1 Letter of Authority

An authorising letter is required for the Form 23 to be signed and electronically lodged on your organisation's behalf. A template for the details required to be provided on the letter of authority is available from the QLD Settlement Notices input screen.

Mail the original letter of authority signed by the appropriate person in your organisation to our Settlements partner, GlobalX Legal Solutions. The postal and DX details are available on the letter of authority template and QLD Settlement Notices input screen.

GlobalX will retain the letter of authority for future use for any settlement notices lodged by your organisation.

You will need to complete a Form 23 Settlement Notice (unsigned) which you will upload to your order when you complete the details on the QLD Settlement Notices input screen.

The Form 23 template is also available from the input screen.

6.2 QLD Settlement Notice input screen

QLD Settlement Notices

Instructions

An authority letter from your organisation is required for us to sign and electronically lodge form 23 on your organisation's behalf. If you have not provided it, please mail the original letter of authority signed by the appropriate person in your organisation to us. Upon receiving, we will retain the letter of authority for future use for any further settlement notices lodged by your organisation.

[Click here](#) for the letter of authority template.

Please post the authority letter to:

GlobalX Legal Solutions Pty Ltd
Attention: GlobalX Conveyancing and Legal Support Services Team
GPO Box 2746
BRISBANE, QLD 4001

Or send via DX:

GlobalX Legal Solutions Pty Ltd
DX 112, BRISBANE QLD

Please also complete a Form 23 Settlement Notice. Upon completion, please upload the form 23 in Step 3 below.

[Click Here](#) for Form 23

We will upload all received documents into your Intelli-Doc, including the dealing advice number once the settlement notice has been lodged.

Please ensure all information supplied on the Form 23 Settlement Notice is correct. Additional charges will apply for any changes/amendments if incorrect information is provided and lodged.

Step 1: Your Details

Name: *	<input type="text" value="Jane Citizen"/>	Phone: *	<input type="text" value="30340000"/>
Email: *	<input type="text" value="jane.citizen@lawyer.com.au"/>		
Your matter/reference: *	<input type="text"/>		

Step 2: Property Details

Lot: *	<input type="text"/>	Plan Type: *	<input type="text" value="Choose one"/>
		Plan: *	<input type="text"/>

Step 3: File Upload

Upload your file *

Step 4: Other information or comments

Step 5:

☐ I authorise GlobalX Legal Solutions Pty Ltd to execute settlement notices on my organisation's behalf.
I agree the information supplied on the Form 23 - Settlement Notice are correct and accurate.
I accept that additional charges will apply if any changes/amendments are required because of incorrect data submitted.

Complete the information required on Steps 1 and 2. The mandatory fields are marked with an asterisk *.

The default contact details for your profile will display in the Name, Phone and Email fields. If required, you can overwrite these details with your contact details.

Enter a matter/reference for this request. This reference will display on your Confirm usage report for this transaction.

Next, upload your Form 23 (unsigned). Click the **Browse** button to locate the document from your files.

Select the authorisation checkbox to allow our settlements partner, GlobalX to execute the settlement notice on your behalf, then click **Save and Continue**.

Your Order Confirmation will display. Click **Print** to print a copy of the confirmation for your records.

QLD Settlement Notices - Order Confirmation

Thank you. Your search details are listed below.
Please note the following confirmation details for your search:
Order ID: 10076116
Matter: AF:RR 07/16
User ID: cnfforda1

You have requested the following:	
User Details	
Name:	jane Citizen
Firm Name:	Confirm
Phone:	30340000
Email:	jane.citizen@lawyer.com.au
Search Details	
Searches:	Queensland Settlements - Lodge Only
Lot Number:	3
Plan Type:	RP
Plan Number:	20706
State:	QLD
Documents uploaded	
Form 23 Document_20160721021835.pdf	
<div>Print</div>	

The Form 23 will be executed by our Settlements partner, GlobalX and then electronically lodged on your behalf.

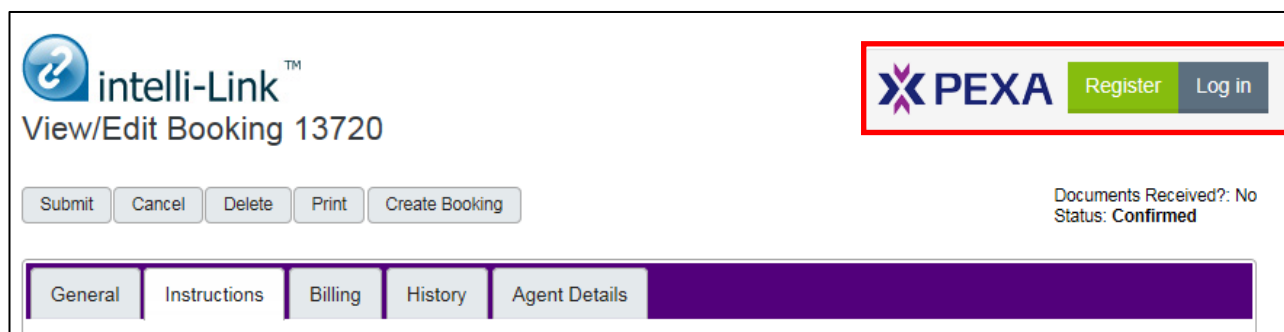
The Lodgement Notice will be available from intelli-Doc once it has been received from the Department of Natural Resources and Mines.

7 PEXA

There are PEXA buttons for **Register** and **Log In** located onscreen on the Create Booking, View/Edit Booking and the Bookings Calendar screens. Access these screens through the National Settlement Service menu items **Create a Settlement Booking**, **Search your Settlement Bookings** and **Bookings Calendar**.

In order to access PEXA through CITEC Confirm you will need to Register as a Subscriber with PEXA, and nominate our PEXA partner, GlobalX as your PEXA sponsor.

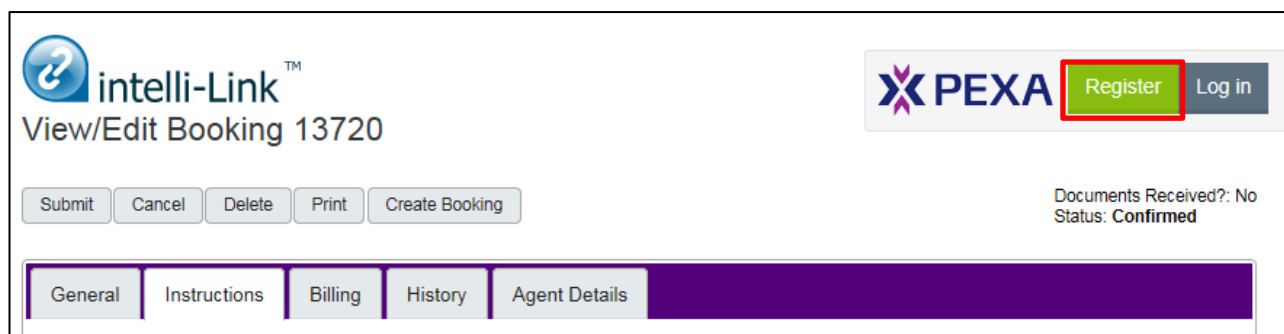
If you are registered already to access PEXA direct, or via another Sponsor, you can change your method of access by completing a **Change PEXA Sponsor** Form. See section 7.21 or contact the Confirm Service Centre on 1800 773 773 to obtain a copy of the form.



The screenshot shows the 'View/Edit Booking 13720' interface. At the top left is the 'intelli-Link' logo. Below it are buttons for 'Submit', 'Cancel', 'Delete', 'Print', and 'Create Booking'. On the right, there's a status indicator: 'Documents Received?: No' and 'Status: Confirmed'. A navigation bar at the bottom contains tabs for 'General', 'Instructions', 'Billing', 'History', and 'Agent Details'. In the top right corner, the PEXA logo is displayed next to two buttons: 'Register' (highlighted with a red box) and 'Log in'.

7.1 Register for PEXA

To register for PEXA, click **Register** on the Create Booking, View/Edit Booking and the Bookings Calendar screens to go to the PEXA Registration page on the PEXA website.



This screenshot is identical to the one above, showing the 'View/Edit Booking 13720' interface. The 'Register' button next to the PEXA logo in the top right corner is highlighted with a red box.

There are 2 parts of the registration process: the online registration process, and the face-to-face verification of identity (VOI).

During the online registration you are required to select how you will access PEXA.
In order to access the PEXA Platform through CITEC Confirm, you will need to select our PEXA partner, GlobalX Legal Solutions.



PEXA have produced a document detailing the steps for PEXA registration:

<https://s3-ap-southeast-2.amazonaws.com/pexa-marketing/RegisteringforPEXA.pdf>

A summary of the steps to complete your online PEXA registration follows. For more information go to the PEXA website: www.pexa.com.au/register/

7.1.1 Online registration:

- ▶ All applicants will be required to sign a PEXA Participation Agreement.
More information can be found at <https://www.pexa.com.au/participation-agreement>
- ▶ Each applicant can order their Digital Certificate during the registration process.
A Digital Certificate is required to electronically sign documents in PEXA.
- ▶ To finalise the setup of your account, the following may be required:
 - Practising certificate/conveyancing licence (individual/organisation)
 - Trust Account details (if applicable)
 - Direct Debit details
 - Digital Certificate Subscriber Agreement (if you require a PEXA Digital Certificate)
 - Trust Deed/ Partnership Deed - please note that these documents will need to be certified.
A certified copy of the Trust Deed Schedule is also acceptable.

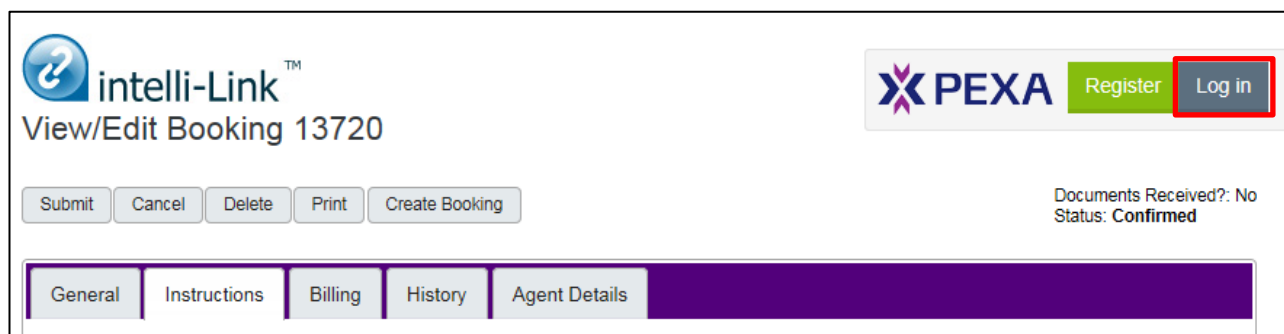
Note: Additional documentation may be required by PEXA to support your application.

7.1.2 Complete Face-to-Face Verification of Identity (VOI)

- ▶ PEXA is required to verify the identity of the person(s) who will sign the Participation Agreement on behalf of your organisation.
- ▶ This VOI can be completed by our PEXA partner GlobalX, or through a VOI agent (for example IDSecure or Australia Post).

7.2 PEXA Log In

You can log in to PEXA through the National Settlement Services menu via **Create a Settlement Booking**.



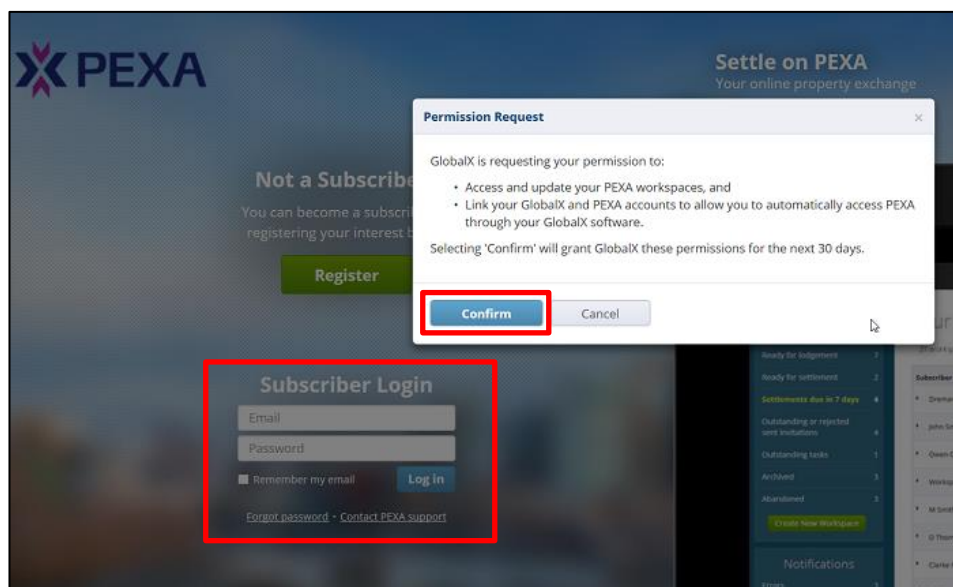
The first time that you log in, a pop-up window will display on top of the PEXA login screen to request permission for our PEXA partner, GlobalX to link your PEXA account.

Linking the account will mean that you will not have to enter your PEXA subscriber login details every time you login to PEXA through the settlements screens.

Note: The PEXA platform currently requires that your password is reset every 30 days. The PEXA login screen will display whenever your password is reset so that these details can be updated.

You will need to enter your PEXA Subscriber Login details on this first login, so that our PEXA partner GlobalX can store these details against your account.

Select **Confirm** to link the accounts. If you do not want the Subscriber Login details to be stored, click **Cancel**.



Note: If your accounts are not linked, then you will be prompted to provide your subscriber login details every time you log in to PEXA through the settlements screens.

7.2.1 Change PEXA Sponsor Form

If you are registered as a subscriber to access PEXA via another Sponsor, you can change your method of access by completing a [Change PEXA Sponsor Form](#) which is available from the [eConveyancing hub](#) on the Confirm website.



You can also contact the Confirm Service Centre on 1800 773 773 or confirm@citec.com.au to be emailed a copy of the form.

You will need to nominate our PEXA partner, **GlobalX Legal Solutions** as your **Incoming Sponsor** on the form.

Once you have completed the details required, please email or post the form to CITEC Confirm and we will submit the request to PEXA on your behalf:

Email: confirm@citec.com.au

Mail: CITEC Confirm Service Centre
GPO Box 279
Brisbane QLD 4001

PEXA will advise all parties when the change has been completed.

8 Verification of Identity (VOI) service – create a client VOI booking






The VOI service allows you to outsource the function of performing verification of identity on your clients. Through our PEXA partner, we can offer an over the counter VOI service as well as a ‘come to you’ service which is available across Australia.

Note: The VOI service is only to be used to perform VOIs of your clients; it cannot be used during the PEXA registration process to verify the identity of the authorised signatory on the PEXA participation agreement.



To book a VOI for a client select **Create a Client VOI Booking** from the National Settlement Services Menu under Other Settlement Services.

National Settlement Services Menu







Settlement Booking and Tracking

-  [Create a Settlement Booking](#)
-   [Search Your Settlement Bookings](#)
-   [Bookings Calendar](#)

Account Services

-   [Request Access to Settlement Services](#)

Other Settlement Services

-   [View My Results \(intelli-Doc\)](#)
-  [QLD Settlement Notice Lodgement](#)
-  [NSW EDR Stamping and Confirmation](#)
-   [Create a Client VOI Booking](#)

The **Create a Verification of Identity (VOI) Booking** input screen will display.

Create A Verification Of Identity (VOI) Booking

Please provide the following details to book Verification of Identity for your clients.
* indicates mandatory fields.

Your Details

Your Reference	<input type="text"/>	*
Contact Name	Jane Smith	*
Phone	30243567	*
Email	jane.citizen@lawyer.com.au	*

Details Of Your Clients To VOI

State Clients Are Located In	VIC	*
------------------------------	-----	---

Client 1

Given Name(s)

Surname

Phone

Email

John

Smith

34567839

john.smith@example.com

✕ Remove

Add Another Client

Other Information

✕ Clear all

Submit

Complete the information required. The mandatory fields are marked with an asterisk *.

Enter a matter/file reference for the request in the **Your Reference** field. This reference will display on your Confirm usage report for this transaction.

The contact details stored in your User Profile will display in the Contact Name, Phone and Email fields. If required, you can overwrite the contact details to be used for this booking.

Note: Details updated on this screen will only apply to this booking. Your profile will not be updated with these new details.

Next, complete the **Details of Your Clients to VOI**. Select the state the client(s) is located in from the drop down menu. Then enter the Given Name(s), Surname and Phone number of the client. Additionally, enter an email address if known.

If you wish to add another client to the booking, click **Add Another Client** and enter their details. You should enter only one client per set of client details. For example, if you wish to VOI Sue and John Smith then Sue and John should be entered on separate lines along with their respective contact details. You are allowed to enter up to 50 clients at a time but you must enter at least one.

If you wish to remove a client's details, click the **Remove** button.

Note: Although the Email field is optional, we recommend that you enter the client's email address if available, so we have an alternative means of contacting the client if we encounter difficulties contacting them by phone.

If you have information available that is relevant or helpful to know when contacting the client, please enter these details in the **Other Information** field. For example, this could include specific information regarding the client's availability, contact hours, or location.

When all details are completed, click **Submit**. Your Booking Confirmation will display.

Create A Verification Of Identity (VOI) Booking Confirmation

The following VOIs have been booked. Our third party service provider will be in touch to complete the process.

Your Details

Your Reference	45677777
Contact Name	Jane Smith
Phone	30243567
Email	jane.citizen@lawyer.com.au

Details Of Your Clients To VOI

State Clients Are Located In	QLD
------------------------------	-----

Client 1

Given Name(s)	John
Surname	Smith
Phone	34567839
Email	john.smith@example.com
Other Information	none supplied

If this is your first time using the VOI booking service then our service provider will contact you to advise you of the process.

Your clients will then be contacted directly to schedule their VOIs. The VOI Certificate for each client will be accessible via View My Results (intelli-Doc) once the Verification of Identity has been performed.

9 NSW OSR Electronic Duties Returns (EDR)

The EDR service allows you to electronically lodge your NSW OSR duties returns online. To access the EDR Service, click **NSW EDR Stamping and Confirmation** from the National Settlement Services Menu.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Search Your Settlement Bookings](#)
- [Bookings Calendar](#)

Account Services

- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)

The **Electronic Duties Returns (EDR)** Menu screen will open in a new window, with the list of EDR service options displayed.

EDR - ONLINE

Electronic Duties Returns (EDR)

The EDR service allows you to process duties transactions online and pay duty by way of a periodic remittance. Select from the options below.

If you are not a registered user, please contact us.

- [Document Stamping](#)
- [Notice of Assessment - Reissue](#)
- [Return Period Invoice](#)
- [OSR Calculator](#)
- [Cancellation Of Duties Assessment](#)

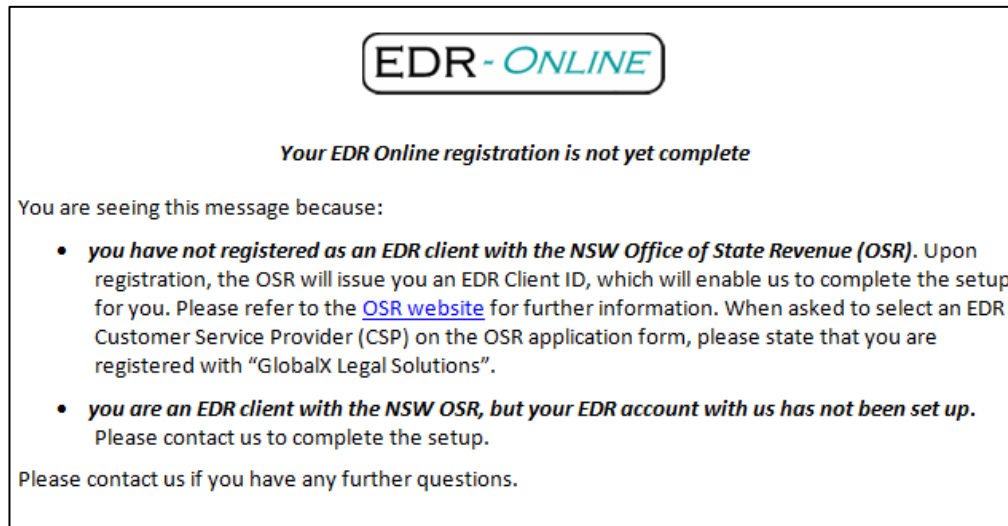
EDR Service Availability

7.00am - 11.00pm Monday - Friday
7.00am - 2.00pm Saturday

Download [Directions for using Electronic Duties Returns \(PDF\)](#) from the OSR website for a full explanation on how to use EDR and the functions available.

9.1 Getting started with NSW OSR EDR Document Stamping

To access EDR Online services we need to have your OSR EDR details on file. If you haven't provided us with this information you will see the following screen when you attempt to access one of the EDR services on the **Electronic Duties Returns (EDR)** Menu.



9.1.1 Already registered at OSR as an EDR Client?

If you have already been approved by the OSR to access EDR then you will need to provide us with the following details to enable us to set up your access via CITEC Confirm.

- ▶ CITEC Confirm Account code
- ▶ NSW OSR Client Name (to match name recorded at OSR)
- ▶ NSW OSR Client Number
- ▶ NSW OSR Client Frequency: Weekly / By transaction
- ▶ The Confirm userId/s that are required to have access to NSW OSR EDR Stamping and Confirmation

Once we've made the required changes to your account you will be able to access EDR online services.

9.1.2 Not currently registered at OSR as an EDR Client?

If you haven't already been approved by the NSW OSR to access EDR then you can apply online on the [OSR website](#). Instructions to guide you through the online application process are also [available on the OSR website](#).

Note: Please ensure you enter our OSR EDR partner **“GlobalX Legal Solutions”** as your EDR Client Service Provider (CSP) when applying online.

Once you've been successfully registered with OSR you will need to provide us with the details listed in [section 8.1.1](#) to complete your set-up via CITEC Confirm. Once we've made the required changes to your account you will be able to access EDR online services.

9.2 Document Stamping

To make a Document Stamping Request, click **Document Stamping** on the EDR Menu.

EDR - ONLINE

Electronic Duties Returns (EDR)

The EDR service allows you to process duties transactions online and pay duty by way of a periodic remittance. Select from the options below.

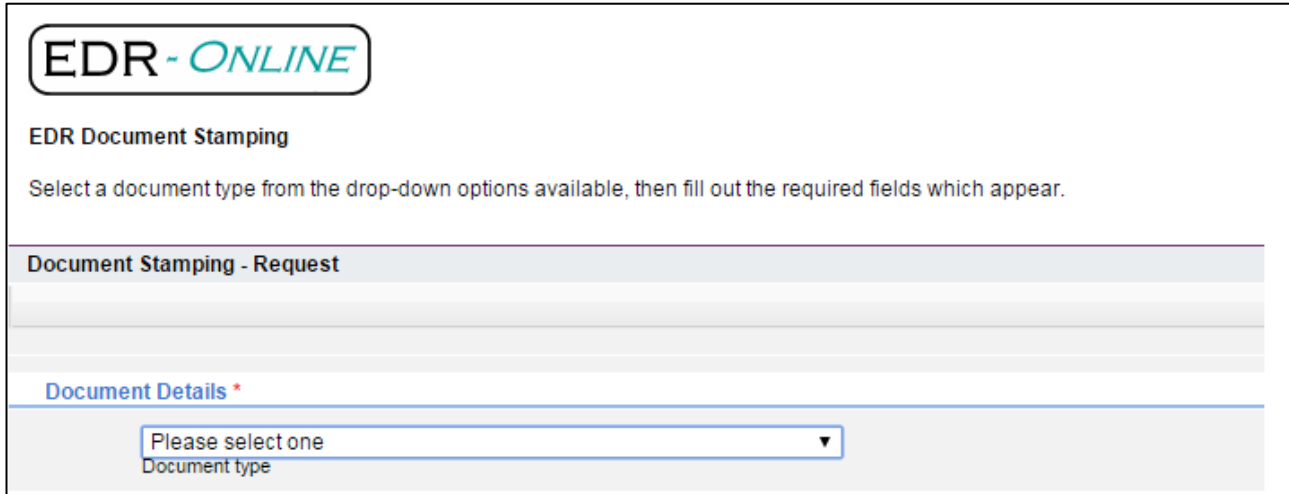
If you are not a registered user, please contact us.

- **Document Stamping**
- Notice of Assessment - Reissue
- Return Period Invoice
- OSR Calculator
- Cancellation Of Duties Assessment

EDR Service Availability

7.00am - 11.00pm Monday - Friday
7.00am - 2.00pm Saturday

Select a document type from the drop-down menu, then complete the information required. Mandatory fields are marked with an * asterisk.



The screenshot shows the 'EDR - ONLINE' interface for 'EDR Document Stamping'. It includes a header with the logo, a title, and a instruction: 'Select a document type from the drop-down options available, then fill out the required fields which appear.' Below this is a section titled 'Document Stamping - Request' with several empty input fields. A 'Document Details *' section follows, containing a dropdown menu with the text 'Please select one' and a downward arrow. The label 'Document type' is positioned below the dropdown.

Once you have entered all the information required for the Document Stamping Request, click **Submit** on the bottom right of the screen. Alternatively, to discard the details entered in the Request and/or to select a different Document type, click **Clear**.

If the information is accepted, a notice of assessment will be created which will allow you to endorse your document with OSR accountable stamps.

If the information is not accepted, you will receive an error message describing why the transaction was rejected. To amend this, modify the data as required and resend the transaction.

Example of Duties Notice of Assessment:

 Office of State Revenue	<h2>Duties Notice of Assessment</h2> <p>Issue Date 19 Nov 2015 Enquiries 1300 308 863 (8.30am - 5.00pm) Website www.osr.nsw.gov.au</p>												
GLOBAL X Post Office Box 111 PARRAMATTA NSW 1739	<table><tr><td>OSR reference</td><td>8393061-001*TEST*</td></tr><tr><td>Total amount payable</td><td>\$351.00</td></tr><tr><td>Due date</td><td>26 Nov 2015</td></tr><tr><td>Assessment no</td><td>1622967949</td></tr><tr><td>Your reference</td><td>test edr stamping</td></tr><tr><td>Client ID</td><td>136807363</td></tr></table>	OSR reference	8393061-001*TEST*	Total amount payable	\$351.00	Due date	26 Nov 2015	Assessment no	1622967949	Your reference	test edr stamping	Client ID	136807363
OSR reference	8393061-001*TEST*												
Total amount payable	\$351.00												
Due date	26 Nov 2015												
Assessment no	1622967949												
Your reference	test edr stamping												
Client ID	136807363												
<hr/>													
Liable party: *** THIS IS A TEST ***													
Assessment summary													
Duty assessed	\$351.00												
Total amount payable	\$351.00												
<p>If you do not pay the total amount payable by the due date, then interest will be imposed on any outstanding balance. You can find information on the current rate of interest at www.osr.nsw.gov.au</p> <p>The due date for payment of this assessment by return has been set in accordance with your approval under section 37 of the Taxation Administration Act, 1996.</p> <p>Please see the back of this notice for general information about this assessment and payment methods.</p> <p>Please refer to the attached statement for detailed information about this assessment.</p>													
Stephen R Brady Chief Commissioner of State Revenue													

The notice of assessment is confirmation that the transaction has been accepted by OSR. It includes:

- ▶ a unique Transaction Number that is OSR's record of the transaction
- ▶ details of transaction
- ▶ duty and interest payable
- ▶ stamping details

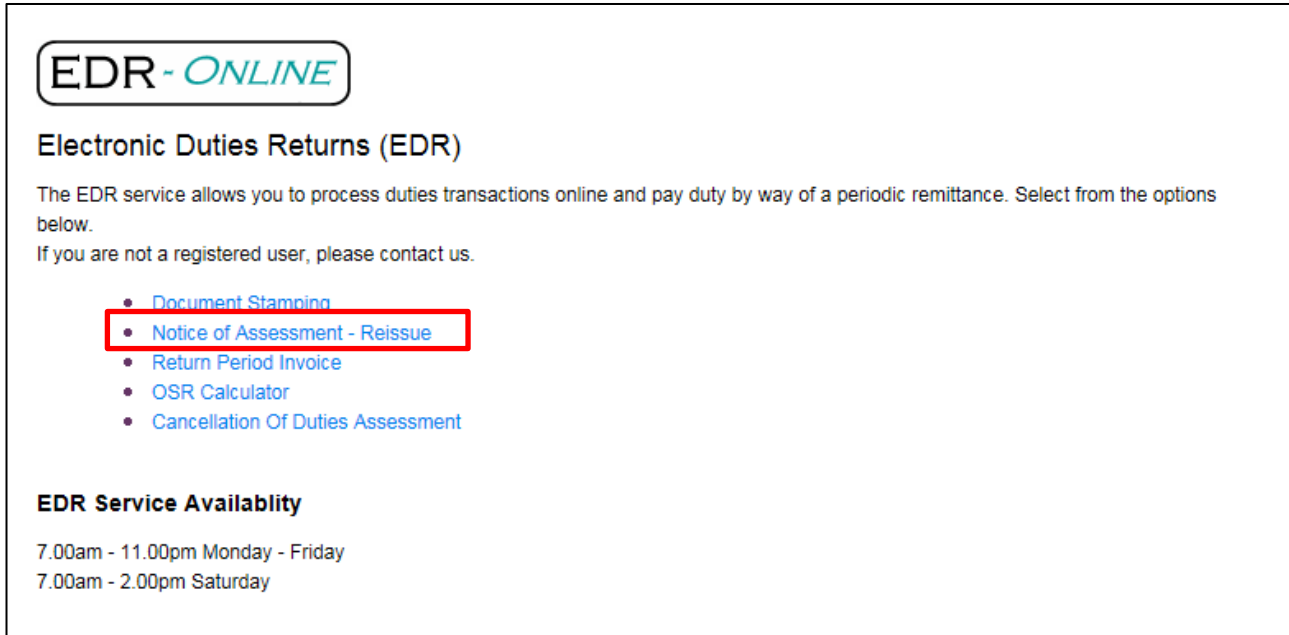
The stamping details provide information to correctly endorse the documents. A copy of the notice must be printed for every transaction and kept for your records.

9.3 Notice of Assessment – Reissue

A Notice of Assessment can only be reissued if you processed the original assessment. The Duties Notice of Assessment is a dynamic document which displays the total amount payable (if any) and any payments that OSR has received.

If full payment has not been received by OSR when the reissue is ordered the duty outstanding and any accrued interest will be displayed.

To request a reissue of a notice of assessment, click **Notice of Assessment – Reissue** on the EDR Menu.



EDR-ONLINE

Electronic Duties Returns (EDR)

The EDR service allows you to process duties transactions online and pay duty by way of a periodic remittance. Select from the options below.

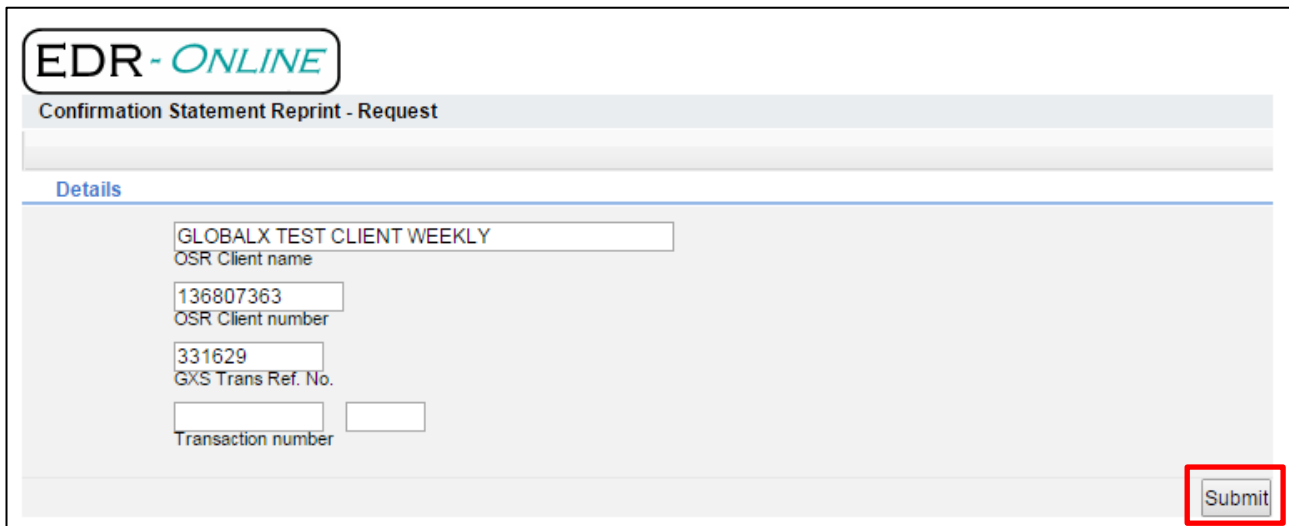
If you are not a registered user, please contact us.

- [Document Stamping](#)
- [Notice of Assessment - Reissue](#)
- [Return Period Invoice](#)
- [OSR Calculator](#)
- [Cancellation Of Duties Assessment](#)

EDR Service Availability

7.00am - 11.00pm Monday - Friday
7.00am - 2.00pm Saturday

Once you have entered all the information required, click **Submit** on the bottom right of the screen.



EDR-ONLINE

Confirmation Statement Reprint - Request

Details

GLOBALX TEST CLIENT WEEKLY
OSR Client name

136807363
OSR Client number

331629
GXS Trans Ref. No.

Transaction number

Submit

Example of Notice of Assessment (excerpt):

 Office of State Revenue	<h2>Duties Notice of Assessment</h2> <p>Issue Date 19 Nov 2015 Enquiries 1300 308 863 (8.30am - 5.00pm) Website www.osr.nsw.gov.au</p>												
GLOBAL X Post Office Box 111 PARRAMATTA NSW 1739	<table><tr><td>OSR reference</td><td>8393061-001*TEST*</td></tr><tr><td>Total amount payable</td><td>\$351.00</td></tr><tr><td>Due date</td><td>26 Nov 2015</td></tr><tr><td>Assessment no</td><td>1622967949</td></tr><tr><td>Your reference</td><td>test edr stamping</td></tr><tr><td>Client ID</td><td>136807363</td></tr></table>	OSR reference	8393061-001*TEST*	Total amount payable	\$351.00	Due date	26 Nov 2015	Assessment no	1622967949	Your reference	test edr stamping	Client ID	136807363
OSR reference	8393061-001*TEST*												
Total amount payable	\$351.00												
Due date	26 Nov 2015												
Assessment no	1622967949												
Your reference	test edr stamping												
Client ID	136807363												
<hr/>													
Liable party: *** THIS IS A TEST ***													
Assessment summary													
Duty assessed	\$351.00												
Total amount payable	\$351.00												
<p>If you do not pay the total amount payable by the due date, then interest will be imposed on any outstanding balance. You can find information on the current rate of interest at www.osr.nsw.gov.au</p> <p>The due date for payment of this assessment by return has been set in accordance with your approval under section 37 of the Taxation Administration Act, 1996.</p> <p>Please see the back of this notice for general information about this assessment and payment methods.</p> <p>Please refer to the attached statement for detailed information about this assessment.</p> <p>Stephen R Brady Chief Commissioner of State Revenue</p>													

9.4 Return Period Invoice

The Return Period Invoice details the total tax payable (duty and interest) for a specified return period. The Invoice will update when OSR receive any payment associated with an assessment for that specified return period.

Each Invoice is supported by three assessment schedules that detail the assessments transacted during the specified return period .At the end of each return period you must request the Invoice to ensure an accurate reconciliation.

To request an Invoice, click **Return Period Invoice** on the EDR Online Menu.

EDR - ONLINE

Electronic Duties Returns (EDR)

The EDR service allows you to process duties transactions online and pay duty by way of a periodic remittance. Select from the options below.

If you are not a registered user, please contact us.

- [Document Stamping](#)
- [Notice of Assessment - Reissue](#)
- [Return Period Invoice](#)
- [OSR Calculator](#)

EDR Service Availability

7.00am - 11.00pm Monday - Friday
7.00am - 2.00pm Saturday

Once you have entered all the information required, click **Submit** on the bottom right of the screen.

Note: At the end of each return period you must request the Return Period Invoice prior to making payment to ensure accurate reconciliation.

EDR - *ONLINE*

Return Period Summary - Request

GLOBALX TEST CLIENT WEEKLY

OSR Client name

136807363

OSR Client number

331633

GXS Trans Ref. No.

Return Period (dd/mm/yyyy)


If you intend to pay by cheque(s) to Locked Box, please ensure you use the payment slip from your booklet.

The payment slip on the Return Period Invoice or Duties Notice of Assessment can no longer be used for cheque payment(s) via Locked Box as the OCR reference line has been removed.

Please do not send the complete Return Period Invoice to Locked Box as this can cause delay in Locked Box processing the cheque(s).

Submit

Example of Return Period Invoice (excerpt):

 Office of State Revenue		Return Period Invoice	
JOHN CITIZEN 18 SAMPLE STREET MCMAHONS POINT NSW 2060		Issue Date	07 Mar 2016
		Enquiries	1300 308 863 (8.30am - 5.00pm)
		Website	www.osr.nsw.gov.au
		Client ID	987654321
		Total amount payable	\$2010.00
		Total number of transactions for period	4
		Period end date	12 Mar 2016
		Due date for period	17 Mar 2016

Summary of Assessments for the Period

Total Amount Payable for Assessments on this Invoice. Refer to Schedule 1 (S1) for details.	\$2010.00
Total Number of Assessments for Individual Payment on this Invoice. Refer to Schedule 2 (S2) for details.	1
Total Number of Assessments Finalised on this Invoice. Refer to Schedule 3 (S3) for details.	2
Total Amount Payable	\$2010.00

The Total Amount Payable will not include payments received for this return period that have not yet been reconciled by OSR.

Please pay by the due date, failure to do so may result in your registration being suspended.

Please see the back of this Return Period Invoice for general information about assessments and payment methods.



Refer to the attached schedules for detailed information about assessments lodged during the return period.

As an EDR approved person it is your responsibility to ensure that all excluded matters listed under Schedule 2 (S2) are paid by the document due date.

Stephen R Brady
Chief Commissioner of State Revenue

Office of State Revenue - Electronic Duties Returns

Do not staple, pin or fold remittance slip

 BPay - Internet or phone banking: Bill Code: 27029 Reference: 1377408127411161 Credit card payments are not accepted.	Due date
	17 Mar 2016
 Electronic payments: BSB no: 032001 Account no: 205573 Account name: OSR EPS Tax Remitting Account Electronic payment code: 137740812YBK112016	Total Amount Payable
	\$2010.00

Client name: JOHN CITIZEN

Note: Remember to print a copy of the Invoice for your records.

9.5 OSR Calculator

The NSW Office of State Revenue has calculators to help estimate tax and duty payable or interest owing. To access the calculators, click **OSR Calculator** on the EDR Menu.

EDR - *ONLINE*

Electronic Duties Returns (EDR)

The EDR service allows you to process duties transactions online and pay duty by way of a periodic remittance. Select from the options below.


If you are not a registered user, please contact us.

- [Document Stamping](#)
- [Notice of Assessment - Reissue](#)
- [Return Period Invoice](#)
- **[OSR Calculator](#)**
- [Cancellation Of Duties Assessment](#)

EDR Service Availability

7.00am - 11.00pm Monday - Friday
7.00am - 2.00pm Saturday

OSR Calculators will open in a new window, and the **Taxes** and **Duties Menu** will be displayed. To expand the menus, click the arrow next to either Taxes or Duties to reveal calculator options.



Office of
State Revenue

[» Skip to content](#)

Home

Taxes

> Land Tax

> Payroll Tax

Duties

> Community development levy

> Interest

> Mortgage Multistate

> Mortgage NSW

> Motor vehicle registration

> Transfer of land or business

> Transfer of shares or units

> First home-new home

> NSW new home grant

OSR calculators

Our calculators will help you estimate tax and duty payable or interest owing. Use these calculators as a guide only and not as a substitute for professional advice.

We recommend you read the latest information about a tax or duty before using any calculator. If you need help using these calculators, [contact us](#).

9.6 Cancellation of Duties Assessment

The NSW Office of State Revenue has introduced a service to enable requests for cancellation of duties assessments to be submitted online. No further paperwork is required to lodge the cancellation request with OSR.

An EDR transaction may require cancellation due to a data entry error, duplication of a transaction, or if a settlement fails. Where one of these triggers occurs a transaction will need to be cancelled.

9.6.1 Important information about cancellation of duties assessments

- ▶ All cancelled transactions must have the duty stamp relating to the transaction cancelled on the documents
- ▶ A cancelled transaction cannot be reinstated
- ▶ A Withdrawal Duties Notice of Assessment is provided by OSR once your cancellation is processed.

The following transactions cannot be cancelled online:

- ▶ An EDR transaction that you did not process. A transaction can only be cancelled by the EDR approval holder who processed the transaction.
- ▶ A transaction where payment has been made
- ▶ A new Home Grant transaction
- ▶ Any transaction where the document has been lodged with Land and Property Information (LPI)
- ▶ Any transaction that has been verified through PEXA
- ▶ Any transaction that relates to a rescinded Contract of Sale of Land or a failed instrument.

9.6.2 Triggers for Cancellation of an EDR Transaction

9.6.2.1 Data Error (reassessment required)

A transaction must be cancelled and reprocessed if the following information is entered or selected incorrectly:

- ▶ Purchase price
- ▶ Date of Execution
- ▶ Document type selected
- ▶ Exemption type selected

Note: There are data errors that can be corrected by OSR and do not require the transaction to be cancelled, for example Party (Purchaser and Vendor) details and Property details.

A request to modify the details, together with a copy of the relevant pages of the stamped document must be submitted by email to edr@osr.nsw.gov.au.

Once the data has been modified you can request an updated Duties Notice of Assessment through CITEC Confirm's EDR service.

9.6.2.2 Duplication of Transaction

If a matter is entered more than once then all duplicated EDR transactions must be cancelled.

9.6.2.3 Settlement Fails

If a settlement does not proceed and the rescheduled settlement date is to occur outside the period to which the Duties Notice of Assessment relates, then the EDR transaction must be cancelled, and any stamp on the document that related to the cancelled transaction must also be cancelled.

9.6.3 Requesting a Cancellation

To access the service click **Cancellation of Duties Assessment** on the EDR Menu.

EDR-*ONLINE*

Electronic Duties Returns (EDR)

The EDR service allows you to process duties transactions online and pay duty by way of a periodic remittance. Select from the options below.

If you are not a registered user, please contact us.

- [Document Stamping](#)
- [Notice of Assessment - Reissue](#)
- [Return Period Invoice](#)
- [OSR Calculator](#)
- [Cancellation Of Duties Assessment](#)

EDR Service Availability

7.00am - 11.00pm Monday - Friday
7.00am - 2.00pm Saturday

The Cancel Duty Assessment input screen will display. Mandatory fields are marked with an asterisk *

NSW OSR Cancel Duty Assessment

Use the form below to cancel a duty assessment previously submitted to NSW OSR.

Matter/File Reference *

Contact Details

Given Names * <input type="text"/>	Surname * <input type="text"/>
Email Address * <input type="text"/>	
Contact Phone Number * <input type="text"/>	
Mobile Number <input type="text"/>	

Assessment Details - the details of the assessment you wish to cancel.

OSR Transaction ID * <input type="text"/>	OSR Document ID * <input type="text"/>
---	--

Supporting documents can be provided to support the cancellation request. Click Add, and then click Browse to upload each document. Next, enter a description of the supporting documentation.

Supporting Documents

You may provide up to 3 documents to support your duty cancellation. Valid file types are: .pdf, .doc, .docx, .jpg, .xls, .txt

Add

Browse

no file selected

You must select a file

Description *

Select the reason for the cancellation from the droplist, and then complete the details of the person submitting the request and the declaration details. If the Contact Details already provided above are the same as for the person submitting the request, and for the declaration, then tick the check boxes to autofill these details.

Cancellation Reason - Please provide your reasoning for cancelling the assessment.

Cancellation Reason *

Select Cancellation Reason

Re-assessment

Duplicate

Settlement failed

Other

Maximum 999 characters (999 remaining)

Submitter Details

☐ Use the same details for both the **Contact** person and the person **submitting** the request

Given Names *

Surname *

Declaration

☐ Use the same details for both the **Contact** person and the person making the **Declaration**

Given Names *

Surname *

Date of Declaration *

Rescinded Contract *

☐ Yes ☐ No

Cost ex GST: \$0.00

GST: \$0.00

Total cost inc GST: \$0.00

Submit

Once all details have been provided, click **Submit** to complete your request. Any supporting documents will upload at this point.



The order summary will display.

NSW OSR Cancel Duty Assessment

Order Summary

Your request is being processed.

The requested certificate will be available in your intelli-Doc.

Please note that a tax invoice will be issued on your next billing cycle.

Order ID: OR-A8GIHPUH8HOIA

Matter Reference: EDR:02/16 ghj

Declared By: Amanda Smith

Assessment to be cancelled

OSR Transaction ID	12345678
OSR Document ID	1234

OSR will return a Withdrawal of Duties Notice of Assessment that will be available in intelli-Doc, and will also be emailed to you (if your User Profile is set-up to receive results via email).

Note:

You are required to keep a copy of your Withdrawal Duties Notice of Assessment for your records.

Example of Withdrawal of Duties Assessment:

**Office of
State Revenue**

Withdrawal of Duties Notice of Assessment
Issue Date 24 June 2016
Client ID 987654321
Assessment ID 769854321
Enquiries 1300 139 814 (8:30am – 5:00pm)
Website www.osr.nsw.gov.au

JOHN CITIZEN
18 SAMPLE STREET
MCMAHONS POINT NSW 2060


Your Duties Notice of Assessment issued under OSR 1234567 has been withdrawn under Section 13 of the Taxation Administration Act 1996.

Duties Notice of Assessment withdrawal

Original OSR reference	1234567 001
Original Issue Date	17/06/2016
Client ID	987654321
Assessment ID	769854321

Stephen R Brady
Chief Commissioner of State Revenue

The cancelled transaction will appear under Schedule 3 of your Return Period Invoice:

**Office of
State Revenue**

S3 Assessments Finalised
Issue Date 07 Mar 2016
Enquiries 1300 308 863 (8:30am – 5:00pm)
Website www.osr.nsw.gov.au
Client ID 987654321
Total number of transactions for period 2
Period end date 12 Mar 2016

JOHN CITIZEN
18 SAMPLE STREET
MCMAHONS POINT NSW 2060

Detail of Assessments for the period:

Client Ref	OSR Ref	Document Type	Party Names	Duty Assessed	Interest	Grant	Total for Document	Paid Indicator	Cheque No	Retain Records Indicator	Document Due Date
ABC123	1234567-001	Agreement for sale of land	JOHN CITIZEN	\$9010.00	\$0.00	\$0.00	\$9010.00	Yes		N	17-03-2016
ABC123	1234567-001	Agreement for sale of land	JOHN CITIZEN	\$9010.00	\$0.00	\$0.00	\$9010.00	Cancelled		N	17-03-2016

< END OF RETURN PERIOD INVOICE FOR CLIENT ID 987654321 - PERIOD END DATE 12-MAR-2016 >

10 NSW Electronic Contract of Sale (eCOS)

The NSW Electronic Contract of Sale (eCOS) allows you to generate an editable PDF document online to prepare a Contract for Sale and Purchase of Land (2016 edition) for a property. The generated eCOS document is prefilled and watermarked with the address details of the property.

eCOS is available from the **National Settlement Services Menu** and the **NSW Lands Menu**.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Lookup Your Settlement Bookings](#)
- [Bookings Calendar](#)

Account Services

- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)
- [Create NSW Electronic Contract of Sale \(eCOS\)](#)

Manual Services Ordering and Tracking

- [Order Manual Services](#)
- [Lookup Your Manual Service Orders](#)

10.1 Create NSW Electronic Contract of Sale

From the National Settlement Services Menu select **Create NSW Electronic Contract of Sale (eCOS)**. The input screen will display.

NSW Electronic Contract for Sale (eCOS) - 2016 Edition

Matter/File Reference *

12345 - AF

Address

Unit Number

10

Street Number *

9a

Street Name e.g. Queen Street *

Cambridge Street

Suburb/Locality *

Gladesville

Postcode *

2111

The information provided here will be used to generate a unique watermark on the Contract for Sale. Please ensure the data you enter is correct, as the Address printed on the document cannot be changed after the eCOS is purchased.

Cost ex GST: \$11.80
GST: \$1.18
Cost inc GST: \$12.98

Purchase

46 of 56

The mandatory fields are marked with an * asterisk. On the input screen enter a Matter/File Reference and the address of the property in the available fields, then click **Purchase** to complete your order.

Note: Ensure that the property address details entered are correct before you click Purchase, as these details will be watermarked on the generated Contract of Sale and cannot be changed.

An order Summary will display.

Electronic Contract for Sale(eCOS)

Order Summary

Your request is being processed.
The requested document will be available in your intelli-Doc.

Please note that a tax invoice will be issued on your next billing cycle.

Matter Reference: 12345 - AF

Order Id: OR-AKCV030LXVUQU

Address

Unit 10 9a Cambridge Street, Gladesville NSW 2111

Cost ex GST: \$11.80
GST: \$1.18
Cost inc GST: \$12.98

New Order

10.2 View your eCOS results

The generated eCOS Document will be available in intelli-Doc. Close the order summary window and return to the National Settlement Services Menu, and select **View my Results (intelli-Doc)**.

The intelli-Doc screen will display. Documents ordered in the last 7 days will be shown as a default, you can use the droplist to change the timeframe for documents displayed. Select the document required and save to another location or email, using the Email or Save buttons.

intelli-Doc

Due to a requirement by NSW Land and Property Information (LPI), all NSW property-related document orders (including all documents from Sydney Water, Hunter Water and the Central Register of Restrictions) will only be stored in your intelli-Doc for 30 days. Please ensure you download any documents currently in intelli-Doc and as they are delivered.

Shared View: Just Mine

Last 7 Days 11/08/2016 to 17/08/2016 Email Save Refresh Clear Filter Keyword... Filter

<input type="checkbox"/>	File Reference	Date	Document Details	Status
<input type="checkbox"/>	12345 - AF	17/08/2016 08:44 AM	NSW Contract for Sale and Purchase 2016 Edition 10 /9a Cambridge Street Gladesville 2111	Complete
<input type="checkbox"/>	12345 - AF	12/08/2016 04:36 PM	NSW Contract for Sale and Purchase 2016 Edition 10 /9a Cambridge Street Gladesville 2111	Complete

10 items per page 1 - 2 of 2 items

Search by File Reference

Enter File Reference...

Show docs by File Reference

12345 - AF
test
AF:RR 07/16
EDR:02/16 ghj

You can also search for documents in intelli-Doc using the date range, Keyword and File Reference search fields.

If you have Email Results selected for your account profile, you will receive an email with the Contract of Sale document.

Subject: NSW Contract for Sale and Purchase 2016 Edition 10 /9a Cambridge Street Gladesville 2111; 12345 - AF

Message 12345_-_AF_NSWContractforS_10_9a_Cambridge_Street_Gladesville_2111.Pdf (344 KB)

Search Confirmation Details:

Time Ordered: 08/12/2016 16:36:29
Matter: 12345 - AF
Search Type: NSW Contract for Sale and Purchase 2016 Edition
Doc Id: 10 /9a Cambridge Street Gladesville 2111

The search produced the following: see attachment

This is a computer generated email. Please contact your Service Provider for further enquiries.

Excerpt of generated eCOS - page 1 with address details prefilled

© 2016 The Law Society of New South Wales ACN 000 000 699 and The Real Estate Institute of New South Wales ACN 000 012 457
You can prepare your own version of pages 1 and 2 of this contract. Except as permitted under the Copyright Act 1968 (Cth) or consented to by the copyright owners (including by way of guidelines issued from time to time), no other part of this contract may be reproduced without the specific written permission of The Law Society of New South Wales and The Real Estate Institute of New South Wales.

Contract for the sale and purchase of land 2016 edition

TERM	MEANING OF TERM	NSW DUTY:
Vendor's Agent		Phone Fax Ref
Co-agent		
Vendor		
Vendor's Solicitor		Phone Fax Ref
Completion Date		day after the contract date (clause 15)
Land - Address - Plan Details - Title Reference	10 /9a Cambridge Street Gladesville 2111	
Improvements	<input type="checkbox"/> VACANT POSSESSION <input type="checkbox"/> subject to existing tenancies <input type="checkbox"/> HOUSE <input type="checkbox"/> garage <input type="checkbox"/> carport <input type="checkbox"/> home unit <input type="checkbox"/> carspace <input type="checkbox"/> storage space <input type="checkbox"/> none <input type="checkbox"/> other:	
Attached copies	<input type="checkbox"/> Documents in the List of Documents as marked or numbered <input type="checkbox"/> Other documents:	

A real estate agent is permitted by legislation to fill up the items in this box in a sale of residential property.

Inclusions	<input type="checkbox"/> blinds <input type="checkbox"/> dishwasher <input type="checkbox"/> light fittings <input type="checkbox"/> stove <input type="checkbox"/> built-in wardrobes <input type="checkbox"/> fixed floor coverings <input type="checkbox"/> range hood <input type="checkbox"/> pool equipment <input type="checkbox"/> clothes line <input type="checkbox"/> insect screens <input type="checkbox"/> solar panels <input type="checkbox"/> TV antenna <input type="checkbox"/> curtains <input type="checkbox"/> other:
Exclusions	
Purchaser	
Purchaser's Solicitor	
Price	\$
Deposit	\$ (10% of the price, unless otherwise stated)
Balance	\$
Contract Date	(if not stated, the date this contract was made)

Buyer's Agent

Vendor	GST Amount (optional) The price includes GST of: \$	Witness
Purchaser	<input type="checkbox"/> JOINT TENANTS <input type="checkbox"/> tenants in common <input type="checkbox"/> In unequal shares	Witness

BREACH OF COPYRIGHT MAY RESULT IN LEGAL ACTION

1

Excerpt of generated eCOS - page 3 with watermark of property address

3	Land - 2016 edition
WARNING— SWIMMING POOLS	
<p>An owner of a property on which a swimming pool is situated must ensure that the pool complies with the requirements of the <i>Swimming Pools Act 1992</i>. Penalties apply. Before purchasing a property on which a swimming pool is situated, a purchaser is strongly advised to ensure that the swimming pool complies with the requirements of that Act.</p>	
WARNING— SMOKE ALARMS	
<p>The owners of certain types of buildings and strata lots must have smoke alarms (or in certain cases heat alarms) installed in the building or lot in accordance with regulations under the <i>Environmental Planning and Assessment Act 1979</i>. It is an offence not to comply. It is also an offence to remove or interfere with a smoke alarm or heat alarm. Penalties apply.</p>	
IMPORTANT NOTICE TO VENDORS AND PURCHASERS	
<p>Before signing this contract you should ensure that you understand your rights and obligations, some of which are not written in this contract but are implied by law.</p>	
COOLING OFF PERIOD (PURCHASER'S RIGHTS)	
<ol style="list-style-type: none">1. This is the statement required by section 66X of the <i>Conveyancing Act 1919</i> and applies to a contract for the sale of residential property.2. The purchaser may rescind the contract at any time before 5 p.m. on the fifth business day after the day on which the contract was made, EXCEPT in the circumstances listed in paragraph 3.3. There is NO COOLING OFF PERIOD:<ol style="list-style-type: none">(a) if, at or before the time the contract is made, the purchaser gives to the vendor (or the vendor's solicitor or agent) a certificate that complies with section 66W of the Act, or(b) if the property is sold by public auction, or(c) if the contract is made on the same day as the property was offered for sale by public auction but passed in, or(d) if the contract is made in consequence of the exercise of an option to purchase the property, other than an option that is void under section 66ZG of the Act.4. A purchaser exercising the right to cool off by rescinding the contract will forfeit to the vendor 0.25% of the purchase price of the property. The vendor is entitled to recover the amount forfeited from any amount paid by the purchaser as a deposit under the contract and the purchaser is entitled to a refund of any balance.	

11 Manual Services Ordering and Tracking

Manual Services enables you to order any service that requires manual processing, for example, requesting stamping and lodgement of documents, lodging documents at ASIC and manual court filing in a number of jurisdictions.

Manual Services is available from the **National Settlement Services Menu** and from the Confirm Main Menu. An additional link has also been included on the Confirm Main Menu for **Court Filing - Manual Services**.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Lookup Your Settlement Bookings](#)
- [Bookings Calendar](#)

Account Services

- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)
- [Create NSW Electronic Contract of Sale \(eCOS\)](#)

Manual Services Ordering and Tracking

- [Order Manual Services](#)
- [Lookup Your Manual Service Orders](#)

Note: If stamping and lodgement of documents for a property settlement is required, these services can be requested when booking your settlement online via Create a Settlement Booking.

11.1 Order Manual Services

From the National Settlement Services Menu select **Order Manual Services**. The Create Manual Service input screen will open in a new window.

intelli-Link™
Create Manual Service

PEXA Register Log in

Submit Cancel Request Manual Service

Documents Received?: No Status:

General

Engagement

Customer* Confirm

Contact Name* Jane Citizen

Phone* 30342359 Call

Email* jane.citizen@lawfirm.com.au x

☐ Send Order Confirmation

☐ Send Docs Received Confirmation

☐ Also CC Email Notifications To:

Matter / Office Ref*

State/Region* QLD - Brisbane CBD

Manual Services

☐ Stamping

☐ Lodgement

☐ Court Filing

☐ Searching

☐ Other

Title Reference

Documents Attached

Cheque Number

1.

2.

3.

4.

Instructions

Enter the details required; all mandatory fields are marked with an * asterisk.

You can request email notifications at various stages of your order. If **Send Docs Received Confirmation** is selected you will automatically receive an email notification when your documents have been received by our manual services partner. You can also enter additional email addresses to be cc'd, to notify other parties.

Once you have entered the information required to place your order, click **Submit**.

11.2 Print Instruction Sheet

Once your order has been submitted, an Instruction Sheet will be generated. Print and attach this coversheet to your documentation and send to our manual services partner, GlobalX. The postal address for sending your documents is located at the bottom left of the Instruction Sheet.

Example of Instruction Sheet:

Clerk Services

CONFIRM

Contact Name: Jane Citizen
Phone: 30342359, Fax:
Email: jane.citizen@lawfirm.com.au
Address: GPO Box 279 Brisbane
QLD 4001

Order No: 16833
Matter/Office Ref: AF 123456

Manual Service

- ☒ Lodgement
☐ Stamping
☐ Court Filing
☐ Court Searching
☐ Other

Please provide the following Services: Lodgement: elodgement

Documents Attached

Plan

Cheque Attached :	1.123456 - cheque to DNRM for \$129.00 2. 3. 4.
-------------------	--

Instructions

Plan to be lodged with DNRM.

Please print this sheet and attach to the documents to be sent to

GLOBALX LEGAL SOLUTIONS

Test Account 001 Brisbane QLD 4000
Phone: 1300727686, Fax:
410 Ann

For Office Use

Service Code: _____
Settled By: _____
Advised: _____
Documents Returned

You can also print the Instruction Sheet from the Print button onscreen.

Successfully submitted order.

Submit Cancel Delete **Print** Request Manual Service

Documents Received?: No
Status: Open

General Billing History Agent Details

Engagement

Customer* Confirm
Contact Name* Jane Citizen
Phone* 30342359 [Call](#)
Email* jane.citizen@lawfirm.com.au
☒ Send Order Confirmation
☒ Send Docs Received Confirmation

Manual Services

☐ Stamping
☒ Lodgement
elodgement
☐ Court Filing
☐ Searching
☐ Other

11.3 Lookup Your Manual Services Orders

To search for an existing order select **Lookup Your Manual Service Orders** from the National Settlement Services Menu, or from the National Manual Services Menu.

National Settlement Services Menu

Settlement Booking and Tracking

- [Create a Settlement Booking](#)
- [Lookup Your Settlement Bookings](#)
- [Bookings Calendar](#)

Account Services

- [Request Access to Settlement Services](#)

Other Settlement Services

- [View My Results \(intelli-Doc\)](#)
- [QLD Settlement Notice Lodgement](#)
- [NSW EDR Stamping and Confirmation](#)
- [Create a Client VOI Booking](#)
- [Create NSW Electronic Contract of Sale \(eCOS\)](#)

Manual Services Ordering and Tracking

- [Order Manual Services](#)
- [Lookup Your Manual Service Orders](#)

On the Manual Services search screen enter your search criteria and click Apply Filter to conduct the search. Any manual service orders found will display onscreen. Simply click the Order No. link in the results table to view the details.

intelli-Link™
Manual Services

Request Manual Service Print Refresh

Created From: To: Type:
Containing Text: Status: Any Region: Any
Docs Received? All
For User: Me

Apply Filter

Order No.	Matter	Status	Created	Title Ref	Type	Docs Recd	Comment From Agent	Billed Time	Contact Name	Created By
16833	AF 123456	Open	17/08/2016 10:03	12345567	Lodgement	No			Jane Citizen	cnfforda1

Your order will display, on the right of the screen you will be able to see if the documents have been received. For order tracking go to the History tab to see the status of the order.

Successfully submitted order.

Submit Cancel Delete Print Request Manual Service

Documents Received?: No
Status: Open

General Billing **History** Agent Details

Engagement
Customer* Confirm
Contact Name* Jane Citizen
Phone* 30342359 [Call](#)
Email* jane.citizen@lawfirm.com.au
☒ Send Order Confirmation
☒ Send Docs Received Confirmation

Manual Services
☐ Stamping
☒ Lodgement
elodgement
☐ Court Filing
☐ Searching
☐ Other

11.4 Billing

Manual services are billed on completion of the service. The transactions will be available via your Confirm usage report once the items have been billed.

To view a usage report for your Confirm account go to the Reports link on the Confirm menu at the top right of the Confirm screen. Select either Daily or Monthly usage report, depending on your requirements.

CONFIRM
The answer you're looking for!

Menu | News | Account Info | Inbox | **Reports**

Statements, Tax Invoices and Usage Reports

Statements and Tax Invoices provide details of all financial transactions.
Adjustment Details Reports display information about manual debits and credits applied during the specified period.
Usage reports list searches performed for the selected period.

OK

Account DEMO-PASG

Select Statements
☒ Current Month Statement
☐ Previous Month Statement for July 2016
Restrict by Your Reference: or Userid:
Please note that "Your Reference" is case sensitive.

Or Adjustment Details Report
☐ Current Month
☐ Previous Month for July 2016

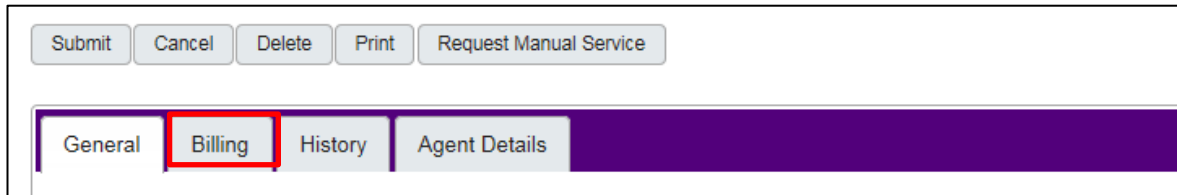
Or Daily Usage Report
☐ for today or ☐ for e.g. 16-JAN-2003
☒ sort by time
☐ sort by Your Reference

Or Monthly Usage Report
☐ for August 2016 covering billing periods: Both
☒ sort by date
☐ sort by Your Reference

OK Clear All

You can view the billing details for a completed manual service through the Billing tab on your manual service order.

From the Manual Services Ordering and Tracking Menu go to **Lookup Your Manual Service Orders** to locate the order, and then go to the Billing tab to view the billing details.



The screenshot displays a user interface for managing manual service orders. At the top, there is a horizontal bar containing five buttons: 'Submit', 'Cancel', 'Delete', 'Print', and 'Request Manual Service'. Below this bar is a tabbed interface with four visible tabs: 'General', 'Billing', 'History', and 'Agent Details'. The 'Billing' tab is currently selected and is highlighted with a red rectangular border. The background of the tab area is a solid purple color.