

Refund
Policy, Procedures, Forms and Registers

POLICY	
Purpose	<p>ATAR Design is committed to providing quality training and assessment in accordance with the Standards for Registered Training Organisations. As such, ATAR Design is required to have and provide detail of a fair and reasonable refund process.</p> <p>The purpose of this policy is to provide for the appropriate handling of client refunds.</p>
Standard reference	5.3
Who is responsible	<ul style="list-style-type: none"> • The CEO is responsible for ensuring compliance with this policy. • The CEO will process refund requests within 2 weeks (14 business days) from the day of receipt.
Review date	Every 12 months
Definitions	NA
Policy	<p>ATAR Design is committed to ensuring fair and reasonable refund practices.</p> <p>ATAR Design will:</p> <ul style="list-style-type: none"> • Implement and maintain a process for fair and reasonable refund of fees paid; and • Provide refunds for fees and charges paid by individuals / clients, where training and assessment activities have not been delivered.
Policy principles	<p>The following principles underpin this policy.</p> <ul style="list-style-type: none"> • Details of Refund Policy are to be publicly available. • Payment of all refunds is made within fourteen business days (14 business days) of application for refund. • With regard to all withdrawals ATAR Design, will firstly encourage a client to enrol on another course date, prior to processing refund applications. • Written notification of withdrawal from a training program must be provided by a client to apply for a refund for a course. This must be by completion of the Refund request form (requests for the form can be via email or verbal). • There is no refund applicable where a client has commenced their course/unit. • There is no refund to participants who do not obtain their qualification after assessment. • There is no refund for recognition of prior learning assessments after enrolment, where Recognition resources and services have been supplied to the client. • ATAR Design does not accept liability for loss or damage suffered in the event of withdrawal from a course by a client. • If for any reason ATAR Design is unable to fulfil its service agreement with a student, ATAR Design must refund the student's proportion of fees paid for services not delivered. In the first instance ATAR Design will (where possible) provide an opportunity for the client to attend another scheduled course. If ATAR Design cancels a course, clients do not have to apply for a refund, ATAR Design will process the refunds automatically

POLICY

The following refund policy will apply:

- ATAR Design reserves the right to retain the amount of administration fees incurred
- ATAR Design will provide a refund to the student within 14 business days of receipt of the 'Application for Refund form'.
- The refundable amount will be for material costs, if the application form is received prior to the commencement of the program and the materials provided are returned in an unused condition
- The administration fee (GST inclusive) is not refundable

No Refund

- ATAR Design will make no refund of any fees if 'Refund request form' is received after the commencement of training
- Discretion may be exercised by the Chief Executive Officer in all situations if the student can demonstrate that extenuating or significant personal circumstance led to their withdrawal. In these cases, the student should be offered a full credit toward the tuition fee in another scheduled program in-lieu of a refund. The Chief Executive Officer may also authorise a refund of tuition fees if in her/his opinion the circumstances require it.
- Where refunds are approved the refund payment must be paid to the student within 14 business days from the time the student gave written notice to cancel their enrolment. Tuition refunds are to be paid via electronic funds transfer using the authorised bank account nominated by the student on the Refund Request Form.

Protecting fees being paid in advance

- ATAR Design acknowledges that it has a responsibility to protect the fees paid by students in advance of their training and assessment services being delivered. To meet our responsibilities ATAR Design adopts the option to accept payment of no more than \$1,500 from each individual student prior to the commencement of the course.
- Following the course commencement ATAR Design will require payment of additional fees in scheduled payments in advance from the student but only such that, at any given time, the total amount required to be paid does not exceed \$1,500
- The basis for determining the amount for scheduled payment must be the costs of the student's training and assessment which is yet to be delivered to the student.

Student complaints about fees or refunds

- Students who are unhappy with ATAR Design arrangements for the collection and refunding of tuition fees are entitled to lodge a complaint. This should occur in accordance with ATAR Design complaints policy and procedure

POLICY

Keeping students informed

To ensure that students are well informed of the financial considerations of their enrolment ATAR Design undertakes to provide the following fee information to each student prior to enrolment:

- the total amount of all fees including course fees, administration fees, materials fees and any other charges provided on the enrolment form
- payment terms, including the timing and amount of fees to be paid and any non-refundable deposit/administration fee;
- the nature of the guarantee given by ATAR Design to complete the training and/or assessment once the student has commenced study in their chosen qualification or course;
- the fees and charges for additional services, including such items as issuance of a replacement qualification testamur, re-assessment and the options available to students who are deemed not yet competent on completion of training and assessment; and
- The ATAR Design refund policy.

Records management

Access and Equity

The Access and Equity Policy applies. (See Access and Equity Policy)

Records Management

All documentation from Refund processes are maintained in accordance with the Records Management Policy. (See Records Management Policy)

Monitoring and Improvement

All Refund practices are monitored by the CEO and areas for improvement identified and acted upon. (See Continuous Improvement Policy)

PROCEDURE		
Step	Who	Procedure
1 Lodgement of Refund by Client	Client	Client completes 'Refund Request Form', notifying their request for a refund of fees paid.
	Admin	<ul style="list-style-type: none"> Review the refund application and ensure that the Client is eligible for a refund. If a refund is due, calculate the amount of refund due. If the money was originally paid by a company, note the refund will apply as a credit to the company account or provide a cheque for the refund. Complete 'Refund Request Form'. Provide completed 'Refund Request Form' to CEO for Approval.
2 Refund of fees Due to Course Cancellation	Admin	<ul style="list-style-type: none"> Should a course be cancelled for any reason, identify all clients who have paid course fees for that particular course. Determine the full amount of refund due to each client. If the money was originally paid by a company, note the refund will apply as a credit to the company account or provide a cheque for the refund. Complete a 'Refund Request Form' for each client eligible for a refund. Provide completed 'Refund Request Form' to CEO for Approval.
3 Management approval for Refund	CEO	<ul style="list-style-type: none"> Review refund and note approval/modification/decline on 'Refund Request Form'. Return Completed 'Refund Request Form' to Admin for processing.
4 Finalise Refund Request	CEO	<p>If a refund is approved:</p> <ul style="list-style-type: none"> Process refund in SMS Enter note in SMS for the client Update the 'Refund Request Form'. Take a copy of completed 'Refund Request Form' for client file. Send original 'Refund Request Form' to finance for processing. File all documentation on client file. <p>If a refund is declined:</p> <ul style="list-style-type: none"> Complete and send written notification to client advising the refund has been declined and the reasons. Enter note in SMS for the client. Update the 'Refund Request Form'. File original completed 'Refund Request Form' and all documentation on the client file.
5 Processing the Refund	CEO	<ul style="list-style-type: none"> Upon receipt of completed 'Refund Request Form' process and make refund to the client. Noting the method of refund. Update finance system (e.g. MYOB, QuickBooks, Xero etc.) File documentation accordingly, in Refunds File.

REFUND REQUEST FORM

Refund Number

SECTION 1 – CLIENT DETAILS

Name:

Date:

Contact Tel:

Mobile:

Email:

Course:

Course Date:

SECTION 2 – REFUND DETAILS

I request a refund for the following:

Invoice Number:

Amount: \$

Reason: (Please attach any supporting documentation)

Acknowledgement: I understand that my request for a refund will be processed in accordance with the ATAR Design Refund Policy.

Signature

Date:

SECTION 3 – AUTHORISATION

Please tick the type of Refund:

☐ Withdrawal

☐ Transfer

☐ Cancellation

☐ Other (please specify)

This Refund amount is:

☐ Approved

☐ Denied

☐ Adjusted To \$

Comments/ Reason for decision / Calculations of Refund

Refund Method is EFT

Signed:

Position:

Print Name:

Date Processed:

ADMIN USE ONLY

Logged in
Refund Register:

☐ Yes ☐ No

Date:

Logged By:

Signature:

Formal Letter /
Email Sent:

☐ Yes ☐ No

Date:

Sent By:

Signature:

REFUND REQUEST REGISTER

KEY: EW = Enrolment Withdrawal | ET = Enrolment Transfer | EC = Enrolment Cancellation | OT = Other

RR Number	Date Raised	Client Name	Raised By	Refund Request Type				Refund Amount	Refund Date
				EW	ET	EC	OT		
1				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
2				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
3				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
4				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
5				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
6				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
7				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
8				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
9				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	
10				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	