

## REFUNDS PROCEDURE

| Encourage Training College Refunds Procedure |  |
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| <b>PURPOSE</b>                               | This process serves as the guide and reference document for the refunds processing of Encourage Training College. Changes to this procedure may only be made upon approval of the Encourage Training College Management. |
| <b>ROLE UNDERTAKING TASK</b>                 | Admin Team   |
| <b>DOCUMENT UPDATE</b>                       | 09 December 2019   |

| STEP 1 – Lodgement of Refund Request   |                           |  |
|--|---------------------------|--|
| No.                                    | Who                       | Actions  |
| 1.1                                    | <b>Student</b>            | a. Client provides written notification of refund request via letter, email or completion of the Refund Request Form and Withdrawal from Training Form (if applicable).  |
| 1.2                                    | <b>Admissions Officer</b> | b. Once the Refund Form has been received, contact the student to determine if other options or pathways are suitable.<br><br>c. If student is withdrawing from commenced training, confirm with the student if a trainer and assessor has been in contact to discuss with him/her to determine reason for withdrawal and offer other options and pathways.<br><br>d. If the student has not been contacted, encourage him or her to continue training where possible and provide options or applicable pathways.<br><br>e. If student still decides to cancel or withdraw training, proceed to processing the refund. |
| STEP 2 – Processing the Refund Request |                           |  |
| No.                                    | Who                       | Actions  |
| 2.1                                    | <b>Admissions Officer</b> | a. Review the Refund Application Form.<br><br>b. Conduct refund eligibility assessment: <ol style="list-style-type: none"> <li>1) Determine when student was enrolled.</li> <li>2) Determine if student applied for refund within the “refund period” or beyond.</li> <li>3) Determine payment method.</li> </ol> c. Notify student that refund cannot be processed if the student is not eligible (beyond the “refund period”).   |

|                                   |                           | <p>d. In situations where the student wishes to claim for refund and experiencing personal difficulties, provide the Special Considerations Form.</p> <p>e. Calculate refund if student is eligible.</p> <p>f. Update the Encourage Training College Refund Register.</p> <p>g. Request for approval from Encourage Training College Management before requesting for refund to be processed (<i>provide the Encourage Training College Manager the link to the Refund Register</i>).</p> |
|-----------------------------------|---------------------------|---|
| 2.2                               | <b>Manager</b>            | <p>h. Review the refund request form and other supporting documents (if applicable).</p> <p>i. If a refund is due and approved update the Refund Register and provide instruction to admissions officer for processing.</p> <p>j. If the refund is not approved update Refund Register and provide reason for decision.</p>   |
| 2.3                               | <b>Admissions Officer</b> | <p>k. If refund is due proceed with processing the refund.</p> <p>l. If refund request is not approved inform student including the reason for the decision.</p>  |
| <b>STEP 3 – Finalising Refund</b> |                           |   |
| No.                               | Who                       | Actions   |
| 3.1                               | <b>Admissions Officer</b> | <p>a. Obtain student bank details (if applicable).</p> <p>b. Process the refund in the SMS.</p> <p>c. Update Debit Success (if applicable).</p> <p>d. Update the Refund Register.</p> <p>e. Send information to Accounts for processing (if applicable).</p> <p>f. File all documentation on student file.</p> <p>g. Inform student of the refund status and timeframes.</p>  |

## VERSION CONTROL

| Version Control Table |   |             |         |
|-----------------------|---|-------------|---------|
| Date                  | Summary of Modifications                                    | Modified by | Version |
| 29/4/2019             | Document creation   | 360RTO      | v. 1.0  |
| 09/12/2019            | Procedure customisation<br>Updated address and phone number | ETC         | v.1.1   |
| 14/07/2020            | Email address and phone number updated                      | 360RTO      | v.1.2   |