

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 refunds processed per the RTO Refund Policy.			
Signature		Date:	
SECTION 3 – AUTHORISATION			
Please tick the type of Refund: <input type="checkbox"/> Withdrawal <input type="checkbox"/> Transfer <input type="checkbox"/> Cancellation <input type="checkbox"/> Other (please specify)			
This Refund amount is: <input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Adjusted To \$			
Comments/ Reason for decision / Calculations of Refund:			
Refund Method is: <input type="checkbox"/> EFT / Credit Card <input type="checkbox"/> Direct deposit <input type="checkbox"/> Credit Note			
Signed:		Position:	
Print Name:		Date Processed:	
ADMIN USE ONLY			
Logged in Refund Register:	<input type="checkbox"/> Yes, <input type="checkbox"/> No	Date:	
Logged By:		Signature:	
Formal Letter/Email Sent:	<input type="checkbox"/> Yes, <input type="checkbox"/> No	Date:	
Sent By:		Signature:	

Refunds

**Purpose:**

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We are committed to providing quality training and assessment per the Standards for Registered Training Organisations. As such, we provide detail of a fair and reasonable refund process.

The purpose of this policy is to provide for the appropriate handling of

- Client refunds.
- Student’s payments and to facilitate refunds in the case of cancellation by either party.

The refunds process will allow students the option to disengage from training in a manner in which a negative impact may be negated or reduced, depending upon the notification time frame.

Unless otherwise stated, all refunds of fees granted per this policy. The terms and conditions of this policy apply to all students, whether they are waiting to commence or continuing studies

**Standard reference:**

Standard 5 Clause 5.3

**Who is responsible:**

The CEO is responsible for ensuring compliance with this policy.

The finance controller will process refund requests within one week from the day of receipt.

**Review date:**

Every 12 months

**Policy**

We are committed to ensuring fair and reasonable refund practices.

We will:

- Implement and maintain a process for a fair and reasonable refund of fees paid. and
- Provide refunds for fees paid by individuals/clients where training and assessment activities not delivered.
- Details concerning our Refund Policy’s scope are to be disseminated to prospective students before contractual arrangements made. This dissemination is in the Student Handbook, Acceptance OF Offer, Enrolment form and Letter of Offer.
- This agreement and the availability of complaints and appeals processes do not remove the student’s right to take action under Australia’s consumer protection laws.

**Procedure:**

- The refund process reflects our commitment to hold places booked by students and the number of administrative resources consumed at the various stages.
- Refunds requested in writing to the Training in Manager of our RTO
- Our RTO training manager will process refund requests and arrange payment within 28 days if approved.
- Refunds paid in Australian Dollars into the nominated bank account
- All advanced payments held in a nominated bank account by us until the course start date allow prompt refund requests.
- All requests for refund processed on an individual basis, taking into account the impact on follow on units /modules if applicable.
- The term “commencement” in this policy refers to the first day of the first program attended by the student.
- Issues regarding payment are to be handled at the first available opportunity and directed to our Training Manager. All Refund Requests and issue refunds logged in the Refund Log.

See table of refunds – Statement of fees document

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#### General Guidelines

- Refund application requests must be made in writing using the student refund request
- Submit the refund request form to the head office
- The Training Manager will process and approve the refund amount (if applicable) based on the circumstances listed in the refund table
- The refund will be made directly to the account stated in the refund request form. The student informed about the same via email.
- All refunds made in Australian Dollars
- If the student is not eligible for any refund, based on the circumstances stated in the refund table, the student informed of the same via an email/letter.
- Any refund given recorded in the Student Information System so that each student’s financial status is known.
- The student has the right to appeal if they are not satisfied with the decision /outcome of the refund request

The following principles underpin this policy.

- Details of the Refund Policy are to be publicly available.
- Payment of all refunds made within one week (seven days) of application for refund
- Written notification of withdrawal from a training program provided by a client is needed to apply for a course refund.
- The written notice must be by completion of the application of refund form. (requests for the document 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.
- We do not accept liability for loss or damage suffered in the event of withdrawal from a course by a client.
- Suppose we are unable to fulfil its service agreement with a student for any reason. In that case, we must refund the student’s proportion of fees paid for services not delivered. In the first instance, it will (where possible) provide an opportunity for the client to attend another scheduled course. If we cancel a time, clients do not have to apply for a refund, and we will process the refunds automatically

The following refund policy will apply:

- We reserve the right to retain the number of administration fees incurred
- We will provide a refund to the student within seven days of receipt of the “Application for Refund form”.
- The application fee (GST inclusive) is not refundable

#### No Refund

- We will make no refund of any fees if the “Application for refund form” is received after the commencement of training
- The Chief Executive Officer may exercise discretion 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 the circumstances require it in her/his opinion.
- Where refunds have approved the reimbursement, payment must be paid to the student within seven days from when they 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 paid in advance

- We acknowledge that it is responsible for protecting students’ fees in advance of their training and assessment services delivered. To meet our responsibilities, We adopt the option to use the Tuition Protection service for fees paid in advance

#### Student complaints about fees or refunds

- Students who are unhappy with our arrangements for collecting and refunding tuition fees are entitled to complain. Complaints should occur per our complaints policy and procedure

#### Keeping students informed

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To ensure the client understands the financial considerations of their enrolment, we undertake to provide the following fee information to each student before enrolment:

- the total amount of all fees, including course fees, application fees, administration fees, materials fees and any other charges provided on the enrolment form, and letter of offer
- payment terms, including the timing and number of costs to be paid and any non-refundable deposit/administration fee.
- The nature of the guarantee given by our RTO to complete the training and assessment once the client commences study in their chosen qualification or course.
- The fees for additional services, including such items as the issuance of a replacement qualification testamur, re-assessment and the options available to students deemed not yet competent on completion of training and assessment. and
- Our refund policy.

Lodgement of Refund by Client. The client:

- completes “Refund Request Form”, notifying their request for a refund of fees paid.

The administrator/training manager

- 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.
- Client banking details provided. All refunds paid in AUD
- Complete “Refund Request Form”.
- Provide completed “Refund Request Form” to CEO for Approval.

Refund of fees Due to Course Cancellation - The administrator/training manager

- Should a course be cancelled for any reason, identify all clients who have paid course fees for that particular course?
- The student banking details provided. All refunds paid in AUD
- Complete “Refund Request Form Complete a “Refund Request Form” for each client eligible for a refund.
- Provide completed “Refund Request Form” to CEO for Approval.
- Management approval for a refund

The CEO must:

- Review refund and note approval/modification/decline on “Refund Request Form”.
- Return Completed “Refund Request Form” to Admin for processing.

Finalise Refund Request - The finance controller must if a refund is approved:

- Process refund in SMS
- Enter a note in SMS for the client
- Update the “Refund Request Form”.
- Take a copy of the completed “Refund Request Form” for the client file.
- Send original “Refund Request Form” to finance for processing.
- File all documentation on the client file.

If a refund declined:

- Complete and send written notification to a client advising the refund has been declined and the reasons.
- Enter a note in SMS for the client.
- Update the “Refund Request Form”.
- File original completed “Refund Request Form” and all documentation on the client file.

Processing the Refund - The Finance controller:

- Upon receipt of the completed “Refund Request Form” process, refund the client, noting the repayment method.
- Update finance system (e.g. MYOB, QuickBooks, Xero etc.)
- File documentation, accordingly, in Refunds File.

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**Records management:**

**Access & Equity**

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

**Records Management**

All documentation from Refund processes is maintained per Records Management Policy. (See Records Management Policy)  
Monitoring and Improvement

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

**Forms**

- Refund Request Form
- Appeals Form
- Complaints and Appeal Policy

**Register**

- Refund register

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