

## REFUNDS PROCEDURE

Australian Institute of Arboriculture Refunds Procedure	
<b>PURPOSE</b>	<p>This process serves as the guide and reference document for the refunds processing of Australian Institute of Arboriculture.</p> <p>Changes to this procedure may only be made upon approval of the Australian Institute of Arboriculture Management.</p>
<b>ROLE UNDERTAKING TASK</b>	Admin Team
<b>DOCUMENT UPDATE</b>	22 June 2018

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.  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.  d. If the student has not been contacted, encourage him or her to continue training where possible and provide options or applicable pathways.  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.  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>

		<p>c. Notify student that refund cannot be processed if the student is not eligible (beyond the “refund period”).</p> <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 Australian Institute of Arboriculture Refund Register.</p> <p>g. Request for approval from Australian Institute of Arboriculture Management before requesting for refund to be processed (provide the Australian Institute of Arboriculture Manager the link to the Refund Register).</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
22/06/2018	Document Creation	Australian Institute of Arboriculture	v. 1.0

