

# RTO45 Refund Policy and Procedure

## Purpose

To provide understanding and guidance for the appropriate handling of learner refund requests.

## Scope

This policy must be adhered to by all BGT managers, staff, board members, students, apprentices and trainees, contractors and volunteers. The refund policy applies to students of BGT both existing and potential students. The policy covers refunds of tuition fees that have already been paid.

## Definitions

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| <b>Statement of Fees</b> | <p>A Statement of Fees is a document that must be given to any learner that commences studies with BGT. The statement of fees must include, at minimum:</p> <ul style="list-style-type: none"> <li>a) the code, title and currency of the program;</li> <li>b) the total cost to them for their program, taking into account any Fee Concession or Fee Waiver entitlement;</li> <li>c) the approximate value of the government contribution expressed in dollars;</li> </ul> <p>and</p> <ul style="list-style-type: none"> <li>d) any other applicable fees, such as student services, amenities, goods or materials.</li> </ul> |
| <b>Invoice</b>           | <p>A list of goods sent or services provided, with a statement of the sum due for each item and the overall charges</p>  |

## Responsibilities

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| <b>RTO Manager</b>                    | <p>To ensure this policy and procedure is followed<br/>         To provide support where required<br/>         To approve or deny any refund requests with fair reasoning</p>  |
| <b>Compliance and Quality Officer</b> | <p>To ensure this policy and procedure is followed<br/>         To undertake reviews of this policy and procedure to ensure that it falls in line with BGT practices, legislative and regulation requirements.<br/>         To provide compliance support where and when required.</p> |
| <b>RTO Trainers</b>                   | <p>To provide the learner with this policy and procedure on request<br/>         To gain the correct refund application form and provide this to the training manager for consideration</p>  |

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| Adminsitration Assistant | <p>To ensure that all refund applications are kept on the learners file and appropriately forwarded to finance for actioning is approved by the Training Manager</p> <p>To contract the learner in writing to advise them of the outcome of their application</p> <p>To provide learners with this policy and procedure on request as well as associated documentation.</p> <p>To forward any refund requests to the Training Manager for consideration.</p> |
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## Policy

Ballarat Group Training (BGT) are a not for profit, that ensure access for all members of the community. In order to allow for respectful and fair opportunity, this refund process allows learners the option to withdraw - within certain timeframes and parameters - from training and assessment with the possibility of minimisation of negative financial impact.

Requests for refunds will be considered on an individual basis. BGT ensures that information regarding refunds is provided to students prior to the commencement of their training, including the terms and conditions for refunds.

A refund may be considered in the following circumstances:

|   |  |   |  |
|---|--|---|--|
| <p><b>Prior to course</b></p> <p>Fees paid above \$50 non-refundable resource deposit</p> | <p><b>Withdraw within 4 weeks of commencing course</b></p> <p>A refund of 75% of the tuition fee will apply*<br/>Resource fee non-refundable</p> | <p><b>Withdraw 4 weeks after commencing course or failure to submit assessments</b></p> <p>No refund **</p> | <p><b>BGT Cancels</b></p> <p>Full refund</p> |
|---|--|---|--|

*\* Dependant on the payments that have been made by the student, may still have to pay a percentage*

*\*\* unless the student can provide a medical certificate or exceptional circumstances. In this case, the RTO Manager will determine the applicable refund.*

### Situations in which a refund may be applicable:

- If a learner requests to transfer to another course internally (delivered by BGT's RTO), then at least 7 days' notice is required. Additional tuition and resource fees may be payable. There will be no refund where the new course has a lesser tuition of resource fee.
- For learners who request to cancel within the first 4 weeks of the course commencing a refund up to 75% minus the resource fees will apply.

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- For learners who request to cancel after the first four weeks has elapsed, no refund is applicable unless the student can provide a medical certificate or show extreme personal hardship. In this case the RTO Training Manager will determine the applicable refund.
- If the program is cancelled by BGT:
  - Before the documented commencement date - a refund of all monies paid by the student will be refunded in full.
  - After the documented commencement date and the course has been partly delivered – a pro-rata amount will be calculated for the tuition fee owing and the balance refunded.
- If a student requests to cancel more than 14 days prior to their course commencing a full refund of the resource fee and a full refund of the tuition fee less the non-refundable deposit will apply. Cancellation within 14 days of the course commencing will result in a refund of the tuition fee less the non-refundable deposit. The resource fee is non-refundable.
- If a student commences a course, but does not complete the course, the full course fee is still payable.

Learners are made aware of the refund policy through the learner handbook as well as this policy being made available on the website to ensure transparency and ease of access to important information.

## Procedure

Upon enrolment all learners are provided with both a Statement of Fees and and Invoice, both with outline payment terms.

Fees payable by learners fall into two categories:

- Resource fees
- Tuition fees

Resource fees non refundable and excluded from any amounts which may be applicable to the refund poicy.

In the instance which a learner withdraws/cancels from their course and are seeking a refund, they are to complete the refund request form.

The employees handeling the learners request can provide a copy of this policy and procedure to the learner and explain the situations in which a learner may be eligible for a refund of tuition fees.

All refund request forms must be submitted to the RTO Training Manager for approval.

Once approved this is forwarded to the Finance Department to action.

The learner is advised in writing of the outcome of their refund application.

If the learner feels the decision is unfair, their have the opportunity to appeal the decision.

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## General Refund Rules and Matters of Understanding

The refund process reflects the commitment by BGT to hold places as booked by learners and the amount of administrative resources and consumable resources that are ordered, utilised and consumed at the various stages of enrolment and administration of course studies up to the point of withdrawal/cancellation

Refunds must be approved by the RTO Training Manager, no refunds will be processed without Managerial Approval.

All requests for refund will be considered and processed on an individual basis.

Issues with regard to payments are to be handled at the first available opportunity and directed to the RTO Training Manager.

The learner should be made aware of this policy and procedures and the particulars contained within prior to commencement of studies. This information is available on BGT's website and its dissemination is in the form of the Learner Information Handbook, this handbook is provided to each Learner and is also available to the general public on our website.

## Associated Documentation

- RTO45.1 Supplementary Documentation
  - o Refund Request Form
- BGT Learner Handbook
- Standards for Registered Training Organisations (RTOs) 2015
- 2023 Guidelines About Apprenticeship/Traineeship Training Delivery
- Skills First Program Contract

## Document History

| Revision date | Department                     | Description of change   |
|---------------|--------------------------------|---|
| 17/02/2023    | Compliance and Quality Officer | Review of the policy and rewriting to bring in line with regulations, legislations and expectations of the organisation |
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