

REFUNDS PROCEDURE

PURPOSE

This process serves as the guide and reference document for the refunds processing of **Trade Skills Australia**. Changes to this procedure may only be made upon approval of the **Trade Skills Australia** Management.

Note that refunds are only applicable if **Trade Skills Australia** closes or through Operations Manager discretion considering extenuating circumstances. All else is non-refundable as per the Fee Administration and Refund policy.

This document will only cover requesting for a refund via extenuating circumstances as cancellation of a course or closing down of the RTO.

ROLE UNDERTAKING TASK

Accounts Manager

STEP 1 – Lodgement of Refund Request		
No.	Who	Actions
1.1	Candidate	a. Candidate provides written notification of refund request via letter or email.
1.2	Accounts Manager	a. Review the written refund request. b. Conduct refund eligibility assessment upon receipt of request: <ul style="list-style-type: none"> • Determine when candidate was enrolled. • Determine amount of payment. c. Ensure evidence is provided by the candidate to qualify for extenuating circumstances.
STEP 2 – Processing the Refund Request		
No.	Who	Actions
2.1	Accounts Manager	a. Calculate refund if candidate is eligible. b. Update the Trade Skills Australia Refund Register. c. Request for approval from Trade Skills Australia Operations Manager before requesting for refund to be processed (provide the Trade Skills Australia Manager the link to the Refund Register).
2.2	Operations Manager	a. Review the written refund request and other supporting documents (if applicable).

		<p>b. If a refund is due and approved update the Refund Register and provide instruction to admissions officer for processing.</p> <p>c. If the refund is not approved update Refund Register and provide reason for decision.</p>
2.3	Accounts Manager	<p>d. If refund is due proceed with processing the refund.</p> <p>e. If refund request is not approved inform candidate including the reason for the decision.</p>
STEP 3 – Finalising Refund		
No.	Who	Actions
3.1	Accounts Manager	<p>a. Obtain candidate bank details (if applicable).</p> <p>b. Process the refund in the SMS.</p> <p>c. Update the Refund Register.</p> <p>d. Send information to Accounts for processing (if applicable).</p> <p>e. File all documentation on candidate file.</p> <p>f. Inform candidate of the refund status and timeframes.</p>

VERSION CONTROL

Version Control Table			
Date	Summary of Modifications	Modified By	Version
11/02/2020	Document Creation	360RTO	v. 1.0
22/02/2023	Document review update role performing function from Administration to Accounts Manager	Compliance Manager	V2.0