

## Policy Name: Funded Students Fees, Charges and Refunds Policy

Effective date	January 2024	Date of last revision	January 2023	Version no.	3.3
Person responsible	Managing Director Streamline Training				

### VERSION HISTORY

Version	Approved by	Revision date	Description of change: amendments/additions/deletions
1.0	<ul style="list-style-type: none"> <li>Managing Director Streamline Training</li> </ul>	January 2015	<ul style="list-style-type: none"> <li>New policy</li> </ul>
2.0	<ul style="list-style-type: none"> <li>Managing Director Streamline Training</li> </ul>	June 2018	<ul style="list-style-type: none"> <li>Review and rewrite, new template</li> </ul>
3.0	<ul style="list-style-type: none"> <li>Managing Director Streamline Training</li> </ul>	December 2021	<ul style="list-style-type: none"> <li>Rebranded and combined to fees, charges and refunds</li> </ul>
3.1	<ul style="list-style-type: none"> <li>Managing Director Streamline Training</li> </ul>	January 2022	<ul style="list-style-type: none"> <li>Updated fees, charges and refunds</li> </ul>
3.2	<ul style="list-style-type: none"> <li>Managing Director Streamline Training</li> </ul>	January 2023	<ul style="list-style-type: none"> <li>Updated fees, charges and refunds</li> </ul>
3.3	<ul style="list-style-type: none"> <li>Managing Director Streamline Training</li> </ul>	January 2024	<ul style="list-style-type: none"> <li>Updated fees, charges and refunds</li> </ul>

### GOVERNANCE

Procedure Owner Position/Title	Managing Director Streamline Training		
Version Number	3.3	Date of Next Review	January 2025
Prepared By	Liz Pilkington	Title	Compliance and Projects
Approved By	Kim Mitchell	Date Approved	January 2023
Related / Supporting Policies	<ul style="list-style-type: none"> <li>Enrolment Policy</li> </ul>		
Related / Supporting Procedures	<ul style="list-style-type: none"> <li>Enrolment Procedure</li> </ul>		
Associated / Supporting Forms	<ul style="list-style-type: none"> <li>Enrolment Form</li> <li>Enrolment Checklist</li> <li>Schedule of Fees</li> </ul>		
	Specific Clauses -	Secondary Clauses -	

Standards for Registered Training Org 2015 (SRTOs2015)	5.3, 7.3, Schedule 6	
External References / Standards / Legislation / Contracts for Compliance	Australian Qualifications Framework (2 <sup>nd</sup> Edition – January 2013)	
Why this policy is required	<p>Where the RTO requires individual learners to pay fees, fee information must be provided prior to enrolment or commencement of training and assessment (whichever is earliest), about:</p> <ul style="list-style-type: none"> <li>• all fees payable to the RTO, clearly describing all costs involved with the course</li> <li>• how and when fees must be paid</li> <li>• how to request a refund, and</li> <li>• conditions under which a refund would be provided.</li> </ul> <p>Where a learner is being enrolled under any loan or delayed payment arrangement, the terms of the arrangement must be clearly stated, including any debt that may be incurred; when repayment is required and under what conditions; and any associated fees, indexation or interest.</p> <p>The options available to an RTO which collects fees in advance are designed to protect individual students in the event that the RTO is unable to deliver the training, assessment and support services agreed with the student.</p>	

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## Purpose

The purpose of this Policy is to ensure that Streamline Training follows Department of Training and Workforce Development (DTWD) Business Rules and Vet Fees and Charges Policies, for funded students.

## Definitions

**Client** – the company or business wishing to enrol participants in the training and assessment activity.

**Student** – the participant in the training and assessment activity.

## Policy

### Course Fee Information for Funded Students

The following fee information is to be provided to each client or student prior to their enrolment:

- The total amount of all fees includes course fees, administration fees, materials fees and any other charges are available in the Schedule of Fees (refer to the *Fee Schedule*).
- Payment terms, (Include the timing and amount of fees to be paid and any non-refundable deposit/administration fees)
  - Streamline Training requires payment of the full fees on enrolment in order to secure a place on the nominated course
  - Payment options are available and can be made in the following ways:
    - present a signed authority from an employer to invoice that employer for the student's fees and charges;
    - pay the fees by instalment\*
  - Streamline Training will not issue certificates to students until payment of all fees has been received.
- the fees and charges for additional services. (Including issuance of a replacement qualification testamur and the options available to students who are deemed not yet competent on completion of training and assessment)
- how to request a refund, and
- conditions under which a refund would be provided

\*Payment by instalment: students are given a minimum of eight weeks from the commencement of the unit to finalise payment when paying by instalment. Students who have fallen behind in their payments must not be enrolled in additional units unless appropriate arrangements, agreed to by both the student and the RTO, have been put in place to pay the amount outstanding.

### Accepting fees in advance

Streamline Training will **not** require a prospective or current student to prepay fees in excess of a total of \$1500.

### Payment Terms and Arrangements for Funded Students:

- The minimum Course Fee payment for Workplace (blended) delivery is established prior to enrolment of each course unless the written invoice indicates otherwise. Minimum fee payments for on-the-job training, corporate training and short courses will be as per the invoice.
- In accordance with Schedule 6 of The Standards; Streamline Training adopts the following to protect fees paid in advance:
  - Streamline Training will not accept prepaid fees from individual students in excess of a total of \$1500 (being the threshold total prepaid fees amount).
  - Streamline Training will hold the students prepaid fees in trust until the student 'commences' their learning or assessment – at a unit/module level.

- Regarding payment plans - Monies in trust for an individual student will not exceed \$1500 at any given time.
- For qualifications or courses costing more than \$1500 in fees, Streamline Training uses a monthly payment plan (flexible payment) model and will not accept prepaid fees from individual students in excess of a total of \$1500 (being the threshold total prepaid fees amount). Monthly payments are calculated using the following formula:
  - $\text{Course cost (divided by) duration} = \text{monthly payment amount.}$
  - The monthly payment is pre-paid for the following month. Typically the payment is made by the 25<sup>th</sup> (day) of the month. Therefore if the student pays on 25<sup>th</sup> February, the payment is for training and assessment in March.
  - Regarding the payment plan model - Monies held in trust for an individual student will not exceed \$1500 at any given time. See *Fee Schedule* for payment schedule.
- For qualifications or courses costing less than \$1500 in fees, Students will have the option of pre-paying in full, or opt for a Flexible Payment Arrangement which are available to accommodate individual circumstances. (such as instalments, credit card, direct debit, cheques and EFT remittance are acceptable to accommodate the diverse financial situations of students.)
- If Flexible payment arrangements or monthly payment plans are in place, and a payment becomes overdue and remains unpaid for a period in excess of 14 days, Streamline Training reserves the right to suspend the student's learning or assessment (or both) until all fee payments are up-to-date.
- Fees must be paid in full before certification will be issued.
- For more information for Funded students, please see the *DTWD VET Fees and Charges Policy* - <https://www.wa.gov.au/system/files/2024-01/dtwd-ppr-vet-fees-and-charges-policy-2024-v1.pdf>

### Payments Made by Employers (for funded students)

Where the employer takes responsibility for the payment of the invoice, Streamline Training may provide a single enrolment invoice/receipt that provides aggregated information on their employees' enrolment details. Students must receive an individual copy of their enrolment invoice/receipt containing all of the relevant information for record keeping purposes where they leave their employment prior to completing the qualification or skill set.

Where employers choose to pay by a Payment Plan, Streamline Training must have a written agreement with the employer outlining when and how the fees will be paid. The agreement must make it clear to the employer that:

- Payments need to align with the fees policy for the UoCs the student has commenced;
- The employer must continue to make payments against all UoCs that have been commenced, even if the student has left/withdrawn after the census date; and
- Payment must be finalised by the time the qualification or skill set is completed.

For more information for Funded students, please see *DTWD Business Rules* -

<https://www.wa.gov.au/system/files/2024-01/dtwd-business-rules-june2022-v1.3-jan2024.pdf>

### Course invoicing

The following fee information is to be provided on an itemised invoice:

- i. Personal details - the first and last name of the Student;
- ii. Course details – national or state identification and course name;
- iii. Concession status (where appropriate);
- iv. Jobs and Skills WA Category (if applicable), for example:
  - Diploma and above qualifications.
  - Apprenticeships and Traineeships.

- Priority Industry Qualifications.
- General Industry Training.
- Foundation Skills and Equity Courses.
- Skill Sets.

v. Enrolment date

A list of all enrolled UoCs, specifying for each UoC the:

- withdrawal/census date;
- nominal hours;
- UoC fee;
- resource fee; and
- fee for Recognition of Prior Learning (where applicable).

vii. Additional itemised fees; and

viii. Total invoice amount.

Please note: Where course fees are subsidised by a “Funding Body” (for example an Australian Apprenticeship or other State / Federal /Territory funded program) these may include a non-negotiable “Student Course Fee”. Streamline Training will ensure these fees are applied and communicated to students at the time of enrolment, in accordance with the relevant Funding body fees policy.

For more information for Funded students, please see DTWD VET Fees and Charges Policy - <https://www.wa.gov.au/system/files/2024-01/dtwd-ppr-vet-fees-and-charges-policy-2024-v1.pdf>

### Refunds for Funded Students

Each funded client or student must also be informed of our refund policy prior to their enrolment, which is:

All cancellation of attendance at a nominated course must be received in writing.

Streamline Training will apply the following percentage of refund to funded student training cancellations (*Funded students are governed by the DTWD VET Fees and Charges Policy -*

<https://www.wa.gov.au/system/files/2024-01/dtwd-ppr-vet-fees-and-charges-policy-2024-v1.pdf> )

- Full refund –
  - If a unit is cancelled or re-scheduled to a time unsuitable to the student, the student may apply for a full refund of fees paid
  - If a student is not given a place due to maximum number of places being reached, the student may apply for a full refund of fees paid
  - If a student withdraws before the census date, the student may apply for a full refund of fees paid
- Pro-rata refund – may be approved by the Managing Director if a student withdraws for reasons beyond their control. Students will need to contact Streamline Training to discuss.
- Refunds for remarking - Students requesting a re-mark of their assessment should do so within four weeks of the date of publication of the results. Should a ‘Not Yet Competent’ candidate achieve an outcome of ‘Competent’ on a re-marking of the assessment, the \$25.00 re-marking charge is to be refunded

For more refund information for Funded students, please see DTWD VET Fees and Charges Policy - <https://www.wa.gov.au/system/files/2024-01/dtwd-ppr-vet-fees-and-charges-policy-2024-v1.pdf>

\* Please note - Census dates apply to funded students and are the last dates you can withdraw from units and apply for a refund. These dates vary depending on the type of enrolment you have and when you enrolled. You will need to check your enrolment notice to see the census date for each unit. Each census date is calculated at no less than 20% of the way through the period which the unit is taken.

### **Key Performance Indicator**

The effectiveness of this policy will be measured by

- The receipt of the correct fees as stipulated.
- Clients' acceptance of refunds issued in accordance with the policy.

### **Monitoring**

All Fees, Charges and Refund practices are monitored by the Managing Director of Streamline Training and areas for improvement identified and acted upon. (See Continuous Improvement Policy)