YOOBEE COLLEGES LTD

Procedure: Student Fee Protection & Refund

The purpose of this procedure is to provide guidance on the implementation of the Fees and Student Fee Protection Policy

PROCEDURES

The following are covered within this document
- Responsibilities
- Fee setting
- Fee payments
- Public Trust management
- Refunds

RESPONSIBILITIES

Campus Administrators (Admin) / Customer Services Officers (CSO) are responsible for tracking students' incoming payment, including fee payments and course related costs. They are also responsible for providing correct information to StudyLink, maintaining payment information in CRM/SMS and Public Trust and for following up on any outstanding student payments for domestic students.

Recruitment Advisors / Course Advisors are responsible for providing students with an offer of place and advising students of relevant payment methods, including via fees free, scholarship, student loan or self-funded.

International admissions are responsible for providing international students with (un)conditional offer of a place, which includes fee payment instructions, and generating the receipt upon payment. They are also responsible for any international student refunds for students whose programme has not started.

International Student Support Officer is responsible for the follow-up on any subsequent payments, after the initial payment for international students.

Campus Managers are responsible for ensuring timely payment and processing of student fees pertaining to their campus.

Head of Operations is responsible for all fee-setting and final approval of any refunds for students who have started their programme.

Registrar is responsible for updating fee information in CRM/SELMA as well as updating fee information held by the TEC via STEO.

FEE SETTING

Fee setting occurs for all new programmes, including new courses within programmes, micro-credentials and short courses. All fees are reviewed annually and fees for the new academic year are largely determined by the TEC.
- Programmes for which students can obtain a student loan are registered with TEC. In most cases, Yoobee Colleges also receives funding from TEC for these programmes.
- Any government-funded programme is bound by the Annual Maximum Fee Movement (AMFM) also referred to as 'Fee Maxima'.
- Tuition fees also include a student services levy component and can have associated course-related costs.
- The student services levy is set annually and covers the cost of services provided to students, such as counselling costs.
- The Head of Operations is responsible for liaising with the student body on the services that are to be included and thereby the cost of the levy.

PROCEDURE: Student Fee Protection and Refunds

Existing programmes

- Each year the Ministry of Education (MoE) determines the level of fee increase for all programmes.
- Following this announcement there is consultation prior to confirmation and public announcement of the fees.
- Once this annual fee increase has been formally approved (and announced), the CEO will confirm the new fees and the Registrar will update the CRM/SELMA for programmes for the following year.
- Registry updates the Head of Operations on the new fees and the Head of Operations actions this information to ensure that this information flows through to Recruitment Advisors and Course Advisors.
- The Head of Operations is responsible for informing the Marketing Team that the fees for the following year are finalised, so that the Marketing Team can update the website and any other marketing collateral that includes fee information.
- Offer letters for the following year are issued with current year pricing subject to changes being made when fees for the following year are announced.
- Once fees have been announced offer letters will be reissued if required and students asked to pay any difference or are provided with a refund, as appropriate.

New programmes

- As part of the programme development process the Head of Operations (HoO) requests the fee maxima for the courses within the new programme from the Registrar.
- The registrar requests the fee maxima with the TEC. These are based on the **delivery classification**, **NZSCED code**, level of the course and the course EFTS value.
- Once the fee maxima have been obtained, the CEO in collaboration with the Finance Manager sets the fee for the programme, which can be either at the maxima or lower than the maxima.
- The HoO communicates the approved fee via CRM/SELMA to internal teams, such as Marketing and Sales.

FEE PAYMENT

All students are required to pay all fees owing to Yoobee Colleges, except when their fees are paid via a government payment incentive, such as, but not limited to: 'Fees Free'; or a 'Targeted Training and Apprenticeship Fund'; or via a scholarship.

TEC funded programmes

Domestic Students

- A student is deemed 'enrolled' when they have met the entry criteria and have signed the 'enrolment contract'. Once enrolled, a student receives an invoice for payment, specifying how the total fee is made up, such as specifying tuition, student services levy and course related costs.
- As part of the enrolment process, the Recruitment Advisor (RA) or Course Advisor (CA) confirms the student's status regarding any 'Fees Free' eligibility. For students whose status is either 'Not eligible' or 'Maybe eligible', the student is advised of student loan options via StudyLink.
- For students who are eligible for 'Fees Free', payments will be made directly from TEC to Yoobee Colleges. Any course related cost is the responsibility of the student, who can either pay this cost directly, or who can obtain a student loan for this portion of the fees.
- Where a 'Maybe' student changes to an 'Eligible' student, any funds received by the student either direct or via StudyLink, will be returned as soon as practicable.

StudyLink

- Students who take out a loan via StudyLink are advised of the programme, and where needed the Campus Administrator (CA) or Campus Service Officer (CSO) assists the student with the application process.
- Once the request is received by StudyLink, StudyLink sends a Verification of Study (VoS) request to the provider, it is the responsibility of the CA or CSO) to return the correct information to StudyLink within 48 hours.
- Once the VoS is returned, the student fees are paid into Yoobee's Trust Account.

Non-payment

- Accountability for the follow-up of non-payment is the Campus Manager (CM) who will normally delegate responsibility for following up nonpayment to the CA or CSO. This is the case for all fees, other than those paid via 'Fees Free' or other government funding mechanism, these include: course related cost not covered by 'Fees free' or similar government funding; and fees that are payable via the student, either via StudyLink or by other means.
- Where a student's Fees Free eligibility is either 'Not eligible' or 'Maybe eligible', and the student is obtaining a student loan via StudyLink, the CA or CSO must ensure that the student has undertaken the relevant steps towards payment of fees. These students must reach a status of 'CON' - meaning the loan contract has been sent out to the students.
- **The CA or CSO must ensure the student has returned their signed contract to Yoobee or StudyLink as appropriate by day one of the programme commencement.**
- If there is late enrolment for a student their contract status must be confirmed by the date on which they are due to commence there programme.
- **Timeframe for Course Related Costs (CRC), including e.g. payment for kits:**
  Contact status not obtained, or CRC not received by:
    - **Day 5** of the programme start date, the student is to receive clear verbal communication of the outstanding CRC
    - **Day 8** of the programme start date, the student is to receive written communication of the ousttanding CRC
    - **3 Weeks** after the programme start date, the student is to be suspended from class, until proof of payment of CRC – including for kits – has been received, or the student can provide proof that the contract has been returned to StudyLink
    - **1 Month** after the programme start date, the student is to be withdrawn from the programme
- Where a student's tuition fees are paid by Fees Free or any other government fund or scholarship, but the student still has other outstanding fees, such as course-related costs or other expenses, the above **timeframe** applies to the outstanding payment amount.

Part Payment

In exceptional circumstances, Domestic Students may request a payment plan for fees which allows their fees to be paid in instalments.

Domestic Students requesting to pay fees through an agreed plan must fill in the requisite form and submit this to the Campus Manager for consideration, including the reason why the student requires part payment.

The Campus Manager then will forward to the Finance Manager for approval.

Payment of fees will be tracked by the Campus Administrators using the Public Trust exception reporting system, and a monthly report submitted to the Finance Manager for review by the end of working day three of the following month.

If a student falls behind with their agreed payment plan the Campus Manager is to discuss with the student directly. If an installment becomes more than two weeks overdue, the Campus Manager may exclude the student from the classroom until the arrears are caught up. If an installment becomes more than four weeks overdue then debt collection processes will be commenced.

International Students

- International payments are requested by the international admissions department.
- Students either pay by 'fly-wire', which is transferred into Yoobee Colleges' Trust Account by the Finance Team, or the student pays directly into Yoobee Colleges' Trust Account.
- International Admission staff enter the paid amount into the CRM system and provide the student with a detailed receipt.
- Students obtain a student visa based on the portion of tuition paid. It is therefore not likely that a student can study without having paid all the fees for that portion of the programme for whish fees

have been paid. In the rare case where a student does have a valid student visa, thereby allowing the student to study whilst having outstanding fees, the above domestic timeframe for payment applies.

Short courses
- All students studying a short course need to have paid for the course prior to the start date. Secondary school students who enroll/study via their school are exempt from meeting this requirement. Payment is organised with the school, who then pay by invoice with standard invoice payment procedures.

PUBLIC TRUST MANAGEMENT

In accordance with the Fees and Student Fee Protection Policy, any student fees amounting to $500 or more must adhere to the student fee protection regulations, thus necessitating the deposit and maintenance of fees in a Trust Account. Yoobee Colleges uses 'Public Trust' as its Trust Account.
- The Quality Team Admin Support is responsible for allocating payments received within the Public Trust Head Office Account into the relevant Campus Account.
- The Quality Team Admin Support informs CA and CSO daily for which student tuition payment has been received into the Public Trust (PT) Account.
- The CA or CSO is responsible for creating an individual student account for each student on their campus for whom they have received, or expect to receive, payments into the PT account, as soon as the student status becomes 'enrolled', but no later than the Friday prior to the start date (on a Monday).
- The CA or CSO is responsible for ensuring the student signs the 'Fee Protect Student Acknowledgement Form'. The signed form is sent to Public Trust and uploaded to the student's record in CRM, as soon as practicable but l by no later than day 8 of the programme start date.

REFUNDS

Students are entitled to a refund dependent of their study status as appropriate. The amount to be refunded is dependent on whether a student is domestic/international, the length of the programme and the reason for the refund (see Withdrawal, Deferral, Cancellation and Refund Policy).
- Any refund due to overpayment is to be processed as soon as practicable and to the person or organisation that made the payment.

Domestic and International Students
- Refunds for students who did not commence their study are processed by the CA or CSO.
- Where a student withdraws within the refund period (as described in the Withdrawal, Deferral, Cancellation and Refund Policy) are signed off by the Campus Manager and any refunds are subsequently processed by the CA or CSO.
- Any other refunds need to be signed off by the Head of Operations in collaboration with the Campus Manager.
- Refunds need to be processed either via the 'Domestic Student Refund Form' or the 'International Student Refund Request Form'
- All documentation needs to be fully completed and subsequently uploaded to the student's file.

International Students
- International refund requests where the student's study start date has not commenced, will be facilitated via the international admission team.
- The International Student Support Officer may assist in the liaison between the Head of Operations, CM, CA/CSO and the international student to assist with the refund process described above.

TERMINOLOGY

Tuition Fees: the gross payment relating to all costs of a programme, micro-credential, training package and short course (for the avoidance of doubt including commissions, course expenses, and other financial payments related to the programme, micro-credential, training package or short course) paid by or on behalf of a student.

Course Related Cost (CRC): Additional cost to the student for items such as textbooks, software subscriptions, hardware tools, stationery, equipment kits and creative tools. It is important to note that students have the right to not pay the CRC in favour of obtaining the items themselves. However, to ensure students have the correct goods/items Yoobee Colleges provides students with a CRC package, which usually has financial savings for the student.

Scholarship: financial aid to a student, based on: academic merit (or prize); financial need for learners that would otherwise be significantly disadvantaged; or clear rationale including philanthropic aims and support. (Further details can be found in the TEC funding catalogue)

RELATED POLICIES, PROCEDURES AND DOCUMENTS

- **POLICY** Fees and Student Fee Protection
- **POLICY** Withdrawal, Deferral, Cancellation and Refund
- **PROCEDURE** Withdrawal
- **STAFF GUIDE** A GUIDE TO: StudyLink and Public Trust
- **FORM** International Student Refund Request Form
- **FORM** Domestic Student Refund Form
- **FORM** Domestic Student Request for Payment Plan Form
- **Delivery Classification Guide (TEC):** https://www.tec.govt.nz/funding/funding-and-performance/funding/delivery-classification-guide/
- **NZSCED Code finder:** https://www.educationcounts.govt.nz/data-services/code-sets-and-classifications/new_zealand_standard_classification_of_education_nzsced

PROCEDURE: Student Fee Protection and Refunds