

Fees, Charges, Refund & Cancellation

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Version Control

Current Version:	Current Version: Date	Review Date	Previous Version
12	01/02/2018	1/02/2019	11

Policy Statement

Scope Vision has a fee, charges, refund and cancellation policy designed to be fair and equitable for the client and the RTO, with its foundations in the timing of the withdrawal or cancellation and the surrounding circumstances. Fees charged by Scope Vision are outlined on each course/program flyer.

Purpose

Scope Vision operates in accordance with registration requirements of the Standards for RTOs 2015. Scope Vision's fair and reasonable refund policy meets these registration requirements.

Scope

This policy applies to all courses provided by Scope Vision.

Compliance Requirements

Standards for RTO's 2015.

Change History

Date	Version	Author	Revision Description
01/02/2018	12	MJ	Fees in advance amended to \$1500.00.
20/07/2017	11	MJ	Reviewed in line with Standards for RTO's; removed reference to AQTF, NTIS, definition updates.
11/02/2015	10	MJ	Executive coaching pathway options included; CUA amended to signed tender
10/09/2014	9	MJ	Reviewed for currency; removal of Deed of Indemnity and reference made to CUA
12/02/2014	8	MJ	Updated to encompass Recognition Pathway enrolments
05/09/2013	7	MJ	Updated to reflect change in practice for customised client initiatives
19/12/2012	6	JV	Updated to reflect change to protection of fees paid in advance as a result of internal audit
24/10/2012	5	JV	Updated to reflect current operational procedures
15/07/2009	4	JV	Existing policy maintained for fee for service clients – new policy created for publicly funded programs
03/02/ 2009	4	MJS	PDF format for website
30/01/ 2009	4	MJS	Word document revised ready for PDF. Amalgamated the Fees and Charges Policy with the Refund and Cancellation Policy
10/05/ 2008	3	JV	Guideline on the protection of fees paid in advance
23/10/ 2006	3	JV	Changes made to reflect operational

Approval

Document reviewed by	Document authorised by	Approved for publishing
Joanne Viegas	Maria-Jane Satterthwaite	1/02/2018

Specific Policy Statements

Protection of Fees Paid in Advance

Scope Vision has the financial resources available to meet obligations to learners in the event of a default by the RTO. All fees paid in advance by a learner who has not commenced training or mentoring pathways with Scope Vision will be returned in accordance with our Refund and Cancellation Policy. Scope Vision will not accept payment of more than \$1500.00 from each individual learner prior to the commencement of the course. Following course commencement, Scope Vision may require payment of additional fees in advance from the learner, but only such that, at any given time, the total amount required to be paid which is attributable to tuition or other services yet to be delivered to the learner does not exceed \$1,500.00.

Miscellaneous Charges

Scope Vision may apply the following miscellaneous charge to services provided:

- \$25.00 for a re-issue of Certificate, Qualification or Statement of Attainment
- \$75.00 per assessment where two (2) attempts have previously been made
- A 20% collection fee for overdue accounts that are handed over to debt collectors

Notice of Withdrawal or Cancellation

Learners must advise Scope Vision in writing of their intention to withdraw or cancel their enrolment. This written notice should clearly outline the reasons. The scale of the refund is determined by the amount of notice given. Applications for withdrawal or cancellation must be made in writing to the General Manager of Scope Vision, PO Box 301 Guildford WA 6935. By completing an enrolment form or submission of a Purchase Order a learner is agreeing to our terms and conditions.

Program Cancellation

Should Scope Vision cancel a course, learners are entitled to a full refund (or pro-rata adjusted refund) or transfer of funds to another/future course. In this event, learners will be given their preferred option.

Deferment

Deferment should not occur mid-program unless prevailing circumstances are serious and other options have been exhausted. Should a learner need to defer, the fees paid are non-transferable and non-refundable. Learners will be ensured a preferential place in the next program they are able to attend.

Withdrawal from Enrolment Once Participation Has Commenced

Once participation has commenced in the course/unit, no refund is available to learners who leave before finalising their course/unit unless the learner states **exceptional circumstances** and can provide a medical certificate or show extreme personal hardship. In that case, fees may be refunded on a pro-rata basis, minus an administration fee of 10% of course fee. However, should learners wish to finalise incomplete competencies by attending a future course or completing assessment tasks, the original fee payment can be used as a credit towards that course within six (6) months of the initial enrolment.

Scope Vision will not be obliged under any circumstances to extend the period of a learner's enrolment if the learner has not completed the program/course in the allocated time. Once the allocated time for a given program/course has ended the learner will no longer be able to participate. Should a learner contact Scope Vision prior to scheduled completion of their relevant course time, citing the reasons why they cannot complete the course on time, Scope Vision may, at its discretion allow a small extension of time.

Official notification of withdrawal from a course should be provided in writing to Scope Vision. Support will be offered to the learner at this point as required. Learners may be offered the option of deferral of course if it is a suitable alternative to complete withdrawal. On receipt of the notice of withdrawal, the General Manager of Scope Vision will assess the application and decide whether or not a refund is due. The learner will be advised accordingly and without delay of this outcome and a refund provided where appropriate.

Learners will also be issued with a Statement of Attainment if assessments have been successfully completed for units of competency within the qualification.

Definitions

Term	Definition
Client	Includes learners and corporate clients of the RTO
Customised client initiatives	A learning program developed by the RTO contextualised to the needs and business area of a client
Customised Corporate Program	A customised client initiative developed for a corporate client
Exceptional circumstances	<p>Include:</p> <ul style="list-style-type: none"> extended hospitalisation or illness supported by a medical certificate resulting in extended absences from class pregnancy/childbirth <p><i>Inappropriate</i> circumstances include:</p> <ul style="list-style-type: none"> job change change in working hours convenience of travel to training location moving away retrenchment
Learner	Any person enrolled in nationally recognised training undertaking nationally recognised assessment; may also be known as a candidate for assessment; an individual who is receiving, responding to and processing information in order to acquire and develop competence; this incorporates the processes of preparing and presenting for assessment by way of evidence portfolio
Ongoing customised client initiatives	A customised client initiative scheduled for delivery to more than one group of learners with the same client; or a client cohort scheduled to complete a qualification over a nominated period of time
Recognition Pathway	The pathway whereby a learner demonstrates their current competency in a unit of competence via the submission of an evidence portfolio; mapping evidence to the selected units of competence; no face-to-face learning options are applicable
RTO	Registered Training Organisation: Scope Vision: RTO Code: 4685
RTO Management	Maria-Jane Satterthwaite; Managing Director. Joanne Viegas; General Manager
RTO Agent	Includes trainers, assessors, contractors, administrators, or parties to formal partnership arrangements with Scope Vision; may be referred to as the Partner Organisation in a Partnership Arrangement

Term	Definition
Standards for RTOs 2015	<p>The Standards under which the RTO is governed; their purpose is to:</p> <ul style="list-style-type: none"> • Set out the requirements that an organisation must meet in order to be a Registered Training Organisation (RTO); • Ensure that training products delivered by RTOs meet the requirements of training packages or VET accredited courses, and have integrity for employment and further study; and • Ensure RTOs operate ethically with due consideration of learners' and enterprises' needs

Responsibilities

RTO Management

- To provide a fair and equitable refund and cancellation policy
- To ensure that all clients are aware of the refund policy prior to enrolment or booking of a customised course

Clients

- Clients must advise Scope Vision in writing of their intention to withdraw or cancel their enrolment

Public Program Payment and Cancellation Procedure

Purpose and Scope

This procedure provides the steps involved in the payment and cancellation procedure for all learners enrolled or intending to enrol in a public program provided by Scope Vision.

Procedure

Steps to follow

1. When enrolling into a course, pre-course payment guarantees a placement with Scope Vision. Payment is due within thirty (30) days of issuance of invoice. Scope Vision will not accept payment of more than \$1 500.00 from each individual learner prior to the commencement of the course. Following course commencement, Scope Vision may require payment of additional fees in advance from the learner, but only such that, at any given time, the total amount required to be paid which is attributable to tuition or other services yet to be delivered to the learner does not exceed \$1,500.00.
2. For corporate clients, Scope Vision requires a Purchase Order number, or written confirmation of intent to enrol individual learners into a public program. Upon receipt of this, an invoice is generated. Payment is due no later than thirty (30) days from the date of the invoice.
3. If a learner is unable to attend the agreed training date and needs to postpone their booking they must advise Scope Vision a minimum of ten (10) working days prior to the agreed course date. Alternatively, a corporate client may send a substitute attendee provided appropriate notification is provided.
4. When cancellation of a course enrolment occurs more than ten (10) days from the course commencement a cancellation fee of 10% of enrolment fee is charged.
5. When cancellation of a course enrolment occurs less than ten (10) days from the course commencement a cancellation fee of 50% of enrolment fee is charged.
6. Once training or mentoring has commenced, no refund options are available.
7. Acceptable payment methods are Visa, MasterCard, direct deposit, cash or cheque.
8. A collection fee of 20% of original invoice amount will be charged on all invoices handed over to debt collectors.

Customised Corporate Program Payment and Cancellation Procedure

Purpose and Scope

This procedure provides the steps involved in the payment and cancellation procedure for all Customised Corporate Programs provided by Scope Vision.

Procedure

Steps to follow

1. Scope Vision requires written confirmation from a client of their intent to secure a preferential booking for a customised program. Written acceptance of a quote tendered by Scope Vision, which results in the formal scheduling of training within the Scope Vision calendar and the creation of customised Learning and Assessment Plans constitutes acknowledgement by the client of their engagement of Scope Vision as their Training Provider for program delivery.
2. In the event that a client needs to postpone a customised program within sixty (60) days of the scheduled course date, 10% of the program invoice amount must be paid to cover work already undertaken by Scope Vision on the project. The amount paid will subsequently be deducted from the final invoice payable and a suitable date for the program rescheduled.
3. In the event that a client needs to postpone a customised program within thirty (30) days of the scheduled course date, 50% of the initial program amount must be paid to cover work already undertaken by Scope Vision on the project and future work forfeited due to calendar bookings being confirmed. The amount paid will subsequently be deducted from the final invoice payable and a suitable date for the program rescheduled.
4. In the event that a client needs to cancel a customised program within sixty (60) days of the scheduled course date, 20% of the program invoice must be paid to cover work already undertaken by Scope Vision on the project.
5. In the event that a client needs to cancel a customised program within thirty (30) days of the scheduled course date, 50% of the program invoice must be paid to cover work already undertaken by Scope Vision on the project and future work forfeited due to calendar bookings being confirmed.
6. Full payment on all invoices is required prior to program commencement unless program falls under an approved tender agreement.

7. Where a client is identified as high risk by Scope Vision resulting from either an inability to pay invoices within nominated timeframes, or from consistently cancelling scheduled customised programs, a 50% deposit is required upon scheduling of a customised program. Full and final payment on all program invoices is required two weeks prior to program commencement.
8. For ongoing customised client initiatives, in the event a client reschedules a confirmed training program delivery date within twenty (20) working days of the scheduled date of delivery, a fee of \$2,200.00 (including GST) will be incurred.

Recognition Pathway Payment and Cancellation Procedure

Purpose and Scope

This procedure provides the steps involved in the payment and cancellation procedure for all learners enrolling with Scope Vision via Recognition Pathway.

Procedure

Steps to follow

1. When enrolling to complete either unit/s of competence or a qualification via Recognition Pathway, receipt of a completed enrolment form constitutes notification of your intent to undertake Recognition Pathway options with Scope Vision and an invoice will be raised.
2. Payment is due within thirty (30) days of issuance of the invoice.
3. For corporate clients, Scope Vision requires a Purchase Order number, or written confirmation of intent to enrol individual learners into unit/s of competence or a qualification. Upon receipt of this, an invoice is generated. Payment is due no later than thirty (30) days from the date of the invoice.
4. No refund options are available to learners once the customised Recognition Pathway Evidence Guide has been forwarded, for this reason Scope recommends that learners enrol in no more than 4 units at a time to maximise successful completion.
5. For Executive Coaching clients accessing Recognition Pathways, no refund options are available once the Recognition Pathway Evidence Guide has been customised and coaching sessions commenced. For payment plan clients accessing Executive Coaching at an agreed discounted rate, Scope's acceptance of your completed enrolment form constitutes an agreement for you to pay the total investment as outlined at enrolment. A client nominating to withdraw their enrolment part way through an Executive Coaching Pathway will still be invoiced for the total of the agreed services upon enrolment.
6. Acceptable payment methods are Visa, MasterCard, direct deposit, cash or cheque.
7. A collection fee of 20% of original invoice amount will be charged on all invoices handed over to debt collectors.