

POLICY

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Approved By: President Sabah Randhawa

Authority: [34CFR668](#); [RCW 28B.15](#); [RCW 28B.35.120](#); [RCW 28B.63](#); [RCW 28B.10.270](#); [WAC 250.20.051\(4\)](#); [SAAM 85.54](#); [BOT Rules of Operation 2.3](#)

See Also:

Document #:

[PRO-U5352.03A](#)

[PRO-U5352.03B](#)

[PRO-U5352.03C](#)

[PRO-U5352.03D](#)

[University Catalog](#)

[Transportation Services](#)

Document Title:

Requesting an Adjustment to a Student or General Receivable Account Procedure
Refunding Credit Balances on Student Accounts Via Automatic Banner Chain
Process Procedure

Reviewing Refund Exclusion Report Procedure

Petitioning a Registration Adjustment Procedure

Section: Student Services – Tuition and Fees

Requesting a Parking Refund

POL-U5352.03 ADJUSTING STUDENT AND GENERAL RECEIVABLE ACCOUNTS AND REFUNDING CREDIT BALANCES

This policy applies to adjustments to and refunds from student and/or general receivable accounts. It does not apply to refunds issued directly from a departmental fund when no general receivable account exists.

Definitions:

Financial Aid:

Financial assistance such as Title IV funds (federal student aid), state aid or institutional aid including grants, scholarships, waivers, or loans paid through the University.

General Receivable Account:

The record of charges, payments, and adjustments for non-student customers.

Student Account:

The record of charges, payments, and adjustments for each student including student tuition, fees, on-campus housing, and other campus charges.

Official Withdrawal:

When a student has given official notice to the Registrar's Office or at their extension site to officially withdraw for the quarter or from the University.

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Title IV Funds:

Federal student aid funds which are from federal student aid programs administered by the U.S. Department of Education. Title IV funds include Direct Subsidized/Unsubsidized Loan, Direct Graduate PLUS Loan, Direct PLUS Loan, Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (SEOG), Federal Perkins Loan, and TEACH grants.

1. Director of Student Business Office Ensures Appropriate Adjustments to Student and Customer Accounts

The Director of the Student Business Office (SBO) under the purview of the Vice President for Business and Financial Affairs (BFA) is responsible for the implementation of this policy.

2. Assistance Provided to Students and Families Experiencing Hardship

In situations in which a student is unable to complete the quarter or a class due to compelling circumstances beyond their control, or due to a significant hardship (such as an incapacitating illness or injury), the Office of Student Life may be contacted for assistance in providing a [Dean's Withdrawal](#). The Office of Student Life approves or denies each Dean's Withdrawal petition and notifies the Registrar's Office.

3. Only Authorized Personnel Approve or Apply Adjustments

Only financial managers or their designee, or authorized budget authorities, in accordance with applicable policies, procedures and forms, may approve adjustments to an account. Requested adjustments are applied only by authorized personnel in the Student Business Office following receipt of approval from the appropriate financial manager or budget authority.

4. University Credits Tuition and Applicable Fees When Official Notice of Withdrawal is Provided within Established Deadlines

Students must provide official notice of withdrawal from the University or a course in accordance with University Academic Policies listed in the University Catalog or as officially published by the Registrar's Office, by the following deadlines to be eligible for an automatic credit:

During the academic year if a student officially withdraws from the University or drops a course:

- a) Prior to the sixth day of instruction of the quarter for which the fees have been paid (or are due), the student will receive full credit for tuition and applicable fees.
- b) Beginning on the sixth day of instruction for which the fees have been paid (or

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are due), provided such withdrawal occurs within the first 30 calendar days following the beginning of the term, the student will receive a credit for one-half of applicable tuition and Service and Activity fees. Other mandatory student fees and course fees are not refundable.

Exact deadline dates are published on Western's Registrar [website](#) each quarter.

During summer session, refund deadlines may vary for courses offered through Outreach and Continuing Education which are listed on the OCE [webpage](#) and registration materials.

Information on tuition, fees and specific deadline dates are specified in the [University Catalog](#) under *Student Services – Tuition and Fees*.

5. Students May Petition Registration Charges

A student may petition for a registration adjustment based on a claim of University error, misinformation, or from extraordinary circumstances. See *Petitioning a Registration Adjustment* procedure (PRO-U5352.03D).

Final determination on petition requests will be made by the Registrar. Financial adjustments based on the petition outcome will be assessed and applied by the Student Business Office.

Petitions related to housing and dining must follow Housing and Dining policies and procedures.

6. Students and Customers May Request Non-Registration Related Adjustments to Accounts

Students and customers who wish to request an adjustment to their account for non-registration related charges must contact the University department from where the charge originated, in accordance with the *Adjusting Student or General Receivable Accounts* procedures (PRO-U5352.03A).

7. Financial Aid Recipients May Be Required to Return Aid

Students who received financial aid or other support may be required to return part or all of the aid. See [Financial Aid Repayment Policy](#).

8. University Refunds Credit Balances

Western refunds (disburses) credit balances in the following manner:

- a) Student account credit balances resulting from excess financial aid (both Title IV federal funds and non-federal aid), less applicable account charges, will be

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refunded automatically within the established and required timeframes. Western does not hold or carry over credit balances to apply to future charges.

- b) Student account credit balances resulting for reasons other than financial aid will be refunded automatically on a scheduled basis, or upon request by the student.
- c) If Title IV federal funds are returned to the institution as undeliverable, the institution may make additional attempts to disburse the funds, provided those attempts are made not later than 45 days after the funds were returned or rejected. No later than 240 days, the institution must cease any additional disbursement attempts and return federal funds to the source.
- d) If non-federal funds are returned to the institution as undeliverable, the institution will make additional attempts to disburse the funds. If additional attempts are unsuccessful, funds will be sent to the state as unclaimed property within the prescribed timeframe.
- e) General receivable credit balances will be refunded on a scheduled basis or upon request by the customer.

Balances less than \$2 will not be refunded unless:

- f) Demand for the refund is made within six months from the date the credit was established, or
- g) The balance exists due to financial aid.

9. Documentation Required for Transactions Affecting Receivables

Documentation supporting credits or adjustments to receivables indicating all pertinent information relating to the transactions must be maintained. See the *Adjusting Student or General Receivable Accounts* procedure (PRO-U5352.03A) for specific documentation requirements.

Detailed postings of these supporting documents are to be recorded and maintained by the billing department in the subsidiary ledgers for all outstanding receivables. Detailed postings are to be summarized and entered in the general ledger control account.

10. Director of SBO Ensures Communication of Policy

The Director of SBO ensures:

- a) Appropriate distribution and implementation of the policy and other tools, including training, to assist employees in maintaining compliance, and
- b) The policy and procedures are readily accessible to students and customers.