

POLICY

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](#)

Effective Date: November 26, 2013

Approved By: President Bruce Shepard

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| Cancels: | POL-U5352.03 POL-U5352.04 POL-U5352.05 | Applying Credits to Accounts Refund Policy Issuing Refunds for Credit Balances on Student or General Receivable Accounts |
| See Also: | PRO-U5352.03A PRO-U5352.03B PRO-U5352.03C PRO-U5352.03D University Catalog Parking Services University Residences | Requesting an Adjustment to a Student or General Receivable Account Refunding Credit Balances on Student Accounts Via Automatic Banner Chain Process Reviewing Refund Exclusion Report Petitioning a Registration Adjustment Section: Student Services - Tuition and Fees Requesting a Parking Refund For Housing refunds, see University Residences Financial Policies |

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 a grant, scholarship, waiver or loan 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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1. **Vice President for Business and Financial Affairs Ensures Appropriate Adjustments**

The Vice President for Business and Financial Affairs (BFA) is responsible for the implementation of this policy. The Vice President delegates the daily administration and oversight of this policy and procedures to the Director of Financial Services.

2. **Assistance Provided to Students and Families Experiencing Hardship**

In situations of hardship resulting in withdrawal of one or more courses from an active term:

- a) The [procedures](#) for *Withdrawing from a Course or Quarter as a Result of Hardship* should be followed.
- b) The Dean of Students Office may be contacted for assistance with hardship requests (Ph: 360.650.3706).

3. **Only Authorized Personnel Approve or Apply Adjustments**

Only financial managers or authorized budget authorities, in accordance with applicable policies, procedures and forms, may approve adjustments to an account. 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.

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- b) Beginning on the sixth day of instruction for which the fees have been paid (or 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. Mandatory and course fees are not refundable (mandatory fees exclude tuition and Service and Activity fees).

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

During summer session, refund deadlines may vary for courses offered through Extended Education (EE) which are listed on the [EE 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 Western's [Financial Aid Bulletin](#) website under the *Withdrawing* link.

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8. University Refunds Credit Balances

Refunds will occur in the following manner:

- a) Student account credit balances resulting from excess financial aid (financial aid in excess of applicable account charges) will be refunded automatically within the established and required timeframes.
- 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) 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:

- d) Demand for the refund is made within six months from the date the credit was established, or
- e) 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 Financial Services Ensures Communication of Policy

The Director of Financial Services 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.