



APICS PHOENIX CHAPTER #58

POLICY NUMBER: 03-023

POLICY TITLE: Class Cancellation AND Registrant Withdrawal Refund Procedure

REVISION: A

DATE: 1 December 2003

1. PURPOSE

The purpose of this procedure is to outline the details of managing the cancellation of a public class and / or registrant withdraw from a public class offered by the chapter.

2. PHILOSOPHY

The chapter relies heavily on the income generated from participation in public certification courses and establishing a consistent business flow based on a value-added proposition across all educational processes is essential to the success of the entire educational experience.

3. SCOPE

This procedure is applicable to any individual(s) involved in the education function of the Phoenix APICS Chapter ; e.g., the VP-Education, Education Directors, Chairpersons, education support, Administration, etc. The applicability extends to other members of the Chapter BOD to the extent that their input and / or output is required to the processes described.

4. PROCEDURE

a) DEFINITIONS: None

b) POLICY

I. CLASS CANCELLATIONS

1. A full refund of prepaid course fee will be made for any course that is either canceled or rescheduled to start more than 30 days beyond the original start date.
2. Fee payment may be transferred for another course offering, if space is available and the registrant has requested the transfer in writing, e-mail or fax to the Chapter office.

II. STUDENT WITHDRAWAL FROM CLASS

1. All refunds exclude the cost of student materials.
2. Withdrawals submitted on-line at least 5 business days before the original start date of the class will receive a refund of the registration fee , minus (-) a \$25.00 Processing Fee
3. Withdrawals submitted on-line before the original start date of the class will receive a refund of the registration fee , minus (-) a \$50.00 Processing Fee

Once the program starts, refunds are prorated: 50% - following the first (1st) class session, and 25% following the start of the second (2nd) class session. No refunds following the start of the third (3rd) class session.

c) PROCEDURE (STUDENT WITHDRAWAL)

1. Prospective student initiates the CANCEL registration process by completing the IM Certification Review Seminar Registration Form from the chapter's web-site

1.1 CANCEL RESERVATION

1.2 Select the particular class of interest

1.3 Fill out all required fields including

1.3.1 Name

1.3.2 Company Name

1.3.3 E-mail address

1.3.4 Mailing Address

1.3.4.1 Street

1.3.4.2 City

1.3.4.3 State

1.3.4.4 Zip Code

1.3.4.5 Phone Number

1.3.4.6 Membership affiliation

1.3.4.6.1 APICS / ISM / IMA

1.3.4.7 Membership Number or Student Membership Number

1.3.4.7.1 Membership ID Number and Expiration Date must be provided

1.3.4.8 Price Option

1.3.4.8.1 Member Price

1.3.4.8.2 Student Price Option

1.3.4.8.3 Non-Member Price Option

1.3.5 PAYMENT OPTION

1.3.5.1 Choose MasterCard or Visa Option

1.3.5.1.1 Credit Card Number

1.3.5.1.2 Expiration Date of CC

1.3.5.2 Choose PAY BY CHECK Option

1.4 Upon completion of all REQUIRED fields, the SUBMIT button is entered on the web-site form

2. Upon receipt of the cancellation request, Administrative Services, will review the form and, using the information contained on the form, will determine whether the registrant wanted fees to be refunded OR applied to a future course

3. For a refund request, Administrative Services will calculate the refund amount using current Chapter Refund Policy.

4. Administrative Services will refund the amount due utilizing the same payment method used in making the reservation within 5 business days.

4.2 Under a full refund scenario, Administrative Services will write VOID on the check and return the check via USPS.

5. Administrative Services will notify the registrant via email of the refund amount and date processed.

6. The DIRECTOR will forward any student material to the address shown on the class roster.

d) PROCEDURE - CLASS CANCELLATION

1. DIRECTOR will notify each registrant and Administrative Services via email or phone that the class has been canceled. Each registrant will be asked whether they want their fee applied to a future class or a refund. Responses from each registrant will be forwarded to Administrative Services for processing
2. Administrative Services will update the Chapter Web-site showing that the class has been canceled.
3. Administrative Services will process refunds.

e) ATTACHED FORMS / TEMPLATES

1. Form ED02-a/CLASS_ROSTER_FORM
2. Credit Card Billing Policy / Procedures (TBP)
3. Cash / Check Deposit Policy / Procedures (TBP)

f) OTHER INDIVIDUALS/ ORGANIZATIONS

1. DIRECTOR, ADMINISTRATION
2. DIRECTOR, EDUCATION for PUBLIC CLASSES

g) INSTRUCTIONS REQUIRED FOR IMPLEMENTATION

- 1) Administrative Services must update the Registration Form to reflect all changes dealing with class cancellations and / or registrant withdrawals

5. ATTACHMENTS / OTHER CLOSELY RELATED POLICIES / PROCEDURES

- a) Attachments (All current revision of Chapter Forms may be found on the Chapter website and/or referenced in the attachment to Chapter Policy 01-005)

1. For ED02-a/CLASS_ROSTER_FORM
2. IM Certification Review Seminar Registration Form

6. RESPONSIBILITY

VP _ EDUCATION

7. RESPONSIBLE FOR COUNSEL

The VP-EDUCATION is responsible is responsible for any questions, judgments, or disputes regarding this policy. In the absence of the VP-EDUCATION, the DIRECTOR of Education, PUBLIC CLASSES OR THE Chapter President will make the necessary arbitration judgment or decisions