

Refund Worksheet - Vocational Programs at Title IV Schools Not Taking Attendance

Texas Workforce Commission – Career Schools and Colleges

Instructions: Use this worksheet with all refunds for programs approved by TWC to demonstrate that each refund meets the state's minimum cancellation and refund requirement, even if your school's policy exceeds minimum requirements. Include the completed worksheet in the student's file. You must have all the supportive documentation listed on page 2 of this worksheet readily available upon TWC request; we encourage you to attach copies of that documentation to this worksheet in the student's file. Use a separate worksheet for each program.

Date of this Refund Calculation _____

School #S _____ School Name _____

Student's Name _____ Student's SSN # _____

Student's Address _____

Student's Phone # _____ Refund Computed By _____

Type of funding (Check all applicable) LOAN, GRANT CASH, SPONSORED (by _____)

Program Name _____
(Full name as it appears on the List of Approved Courses of Instruction)

- ➔ 1. Did the student drop from the program within 72 hours (until midnight of the third day, excluding Saturdays, Sundays and legal holidays) after the enrollment contract was signed? Yes No
- ➔ 2. Did the student drop within the first week of the program? Yes No
- ➔➔ If the answer is Yes to either of the above, then the student is due a full refund. ◀◀
- ➔ 3. If the student is not scheduled for three class days during the first week, did the student drop within the first 3 scheduled class days? Yes No
- ➔➔ If the answer to 3. is yes, the school may retain not more than \$100 in administrative fees and items of extra expense that are necessary for the portion of the program attended. Anything retained must be stated separately on the enrollment agreement. ◀◀

Total Course Time in the whole program (1a) _____ Tuition and included fees for the whole program (1b) \$ _____

Total Course Time in the portion charged (2a) _____ Tuition and included fees for the portion charged (2b) \$ _____

- (1) Program hours and costs should reflect totals adjusted for credit given for previous education and training, if applicable.
 (2) Course Time and Tuition for the current portion charged. The current portion charged may be the whole program.

Administrative fee for the whole program (May not exceed \$100): \$ _____ Other charges for the whole program \$ _____

Date of enrollment in the program _____ Date of termination from the program _____

- For the Current Portion Charged: (Use these four items to calculate #2 below).**
- First Day Scheduled (Date) _____ Last Day of Documented Academically-Related Activity (Date) _____
- Hours Scheduled Per Day _____ Days Scheduled Per Week _____
1. What portion of the program is the current portion for which the student has been charged?
 - The whole program → Calculate items below for the entire program.
 - A part of the program → Into how many portions is the program divided?
 For which portion is the student charged? Portion #: _____ Calculate items below for this portion.
- For the current portion of the program for which the student is charged:
 Use whole hours, rounding to the nearest hour if necessary.
2. What are the total hours the student was scheduled for? _____ (through date of the last day of ARA)
 3. What is the Total Course Time in this portion of program? _____ (must match Total Course Time (2a) above)
 4. Calculate the percentage of the program's Total Course Time for which the student was scheduled: _____ (#2 ÷ #3) Will be a decimal.
 Calculate to three decimal places (example: .452 (45.2%).
 Use #4 to calculate #5. If .75 or greater (75% of this portion of the program), use 1.0 (100%) in the calculation.

5. Calculate tuition and included fees earned by the school for the current portion charged:	
Tuition and included fees for the current portion charged	\$ _____ (2b from previous page)
#4 (From previous page)	× . _____ = \$ _____
6. Total of tuition and fees earned from prior (How many? _____) portions charged	\$ _____
Earned fees and supplies for the whole program:	
7. Administrative fees earned, but not included in tuition (not to exceed \$100.00)	\$ _____
8. Chargeable* books not included in tuition (<i>receipts required</i>):	\$ _____
9. Chargeable* supplies and other fees not included in tuition (<i>receipts required</i>):	+ \$ _____
<i>*Must be necessary for portion of program attended & separately stated in enrollment agreement</i>	_____
10. Total earned by school for the whole program	(items 5 + 6 + 7 + 8 + 9) = \$ _____
11. Total amount paid towards #10 on behalf of student (<i>Fees, Tuition, Books, Supplies</i>)	\$ _____
12. Refund due (if #11 is greater than Item #10) =	\$ _____
13. Balance due school (if #11 is less than Item #10)	\$ _____

Documentation:

The following documents must be readily available, preferably attached to this Refund Worksheet in the Student's file:

1. Enrollment Agreement
2. Record of Previous Education & Training (CSC-010)
3. Complete record of academically related activity
4. Complete progress record w/status changes
5. LOA/make-up requests (if applicable)
6. Ledger
7. Book & supply receipts (if applicable)
8. Proof of consummation of refund

For questions concerning Texas Workforce Commission Career Schools and Colleges Cancellation and Refund Policy, please consult the form series CSC-023; law governing Career Schools and Colleges, Title 3, Texas Education Code, Section 132.061 and 132.0611; and the Texas Career Schools and Colleges Rules, Title 40, Texas Administrative Code, Sections 807.261 through 807.264.

Completed forms, inquiries, or corrections to the individual information contained in this form shall be sent to the TWC Career Schools and Colleges, 101 East 15th Street, Room 226T, Austin, Texas 78778-0001, (512) 936-3100. Individuals may receive and review information that TWC collects about the individual by emailing to open.records@twc.state.tx.us or writing to TWC Open Records, 101 E. 15th St., Rm. 266, Austin, TX 78778-0001.
