

Prepared by the Bursar Office  
This is a NEW Policy.

A8.770  
November 2011

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A8.770 Bursar

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A8.770     Student Refunds

1.     Purpose

To establish procedures for issuing refunds and credit balances to students.

2.     Applicability

This directive applies to all campuses of the University of Hawai'i.

3.     Definitions

- a.     Tuition and Fee Refund - An amount owed to a student who has made payment and drops or withdraws from classes by the specified refund deadline at each campus. A refund will result when a student has made payment and a class is cancelled by the University. Refunds may also result when a third party payment, tuition waiver payment, scholarship payment or charge adjustment is posted to a student account.
- b.     Credit Balance Refund - An amount owed to a student created when excess financial aid remains on the student account after all eligible charges on the student account are paid in full and after Title IV financial aid is applied. Parent PLUS Loan proceeds are also considered credit balance refunds.
- c.     Student eCommerce System - The computer system students enter via the University portal to conduct business on-line. Students are able to make payments, join the payment plan, sign up for direct deposit (eRefund) and authorize a third party to pay or view charges.

d. Refund Methods

- 1) Cash Refund - The University does not issue cash refunds.
- 2) Credit Card Refund - Credit card refunds posted within 90 days of the original credit card payment will be posted to the same credit card. If multiple credit card payments were posted within this 90 day period, the first credit card used for payment will be refunded.
- 3) Direct Deposit Refund (eRefund) - Direct deposit is the fastest and most secure way to receive a refund. Students are encouraged to sign up for direct deposit by entering bank account information into the student eCommerce system. Students are responsible to review and update their bank account information annually.
  - a) ACH direct deposits can be transmitted only to U.S. savings or checking accounts.
  - b) Once enrolled in direct deposit, the student will continue to receive all refunds via direct deposit until the student deletes their bank account information on-line.
  - c) A student can only designate one bank account at a time for a direct deposit. Any changes made by the student to their bank account information will replace the previous information.
  - d) It is the student's responsibility to verify that all direct deposit payments have been credited to their bank account before writing checks against their funds or withdrawing cash.
  - e) A refund cannot be split between direct deposit and a paper check.

- f) The University reserves the right to initiate, correct and adjust refund entries posted in error to a student's account.
- g) Parent PLUS loan credit balances may be direct deposited into a student's bank account provided the parent who is the borrower on the loan has provided written or on-line authorization to the University to transfer the loan proceeds to the student.

4) Paper Check Refund

- a) Checks are mailed to the student's mailing address on file in the student information system. If no mailing address is available, then the permanent address on file in the student information system will be used.
- b) Checks generally take 7-10 business days to be processed after the credit appears in the student account, except as noted in section 5d. Refunds not posted on the student account in the student information system may take longer to process. The University is unable to post, print and issue paper check refunds on the same day. Students who want quick access to funds are encouraged to sign up for direct deposit.

4. Refund Schedule

- a. The President establishes the schedule of refunds of tuition and fees as defined in Board of Regents Policy 6-1. Refund schedules for student housing, library, meal plan, parking charges and certain Student Exchange and Study Abroad programs are established separately.
- b. Refunds are based on the amount of tuition and fees charged and not on the amount actually paid.

- c. If a class is officially cancelled, students will automatically receive a full refund of tuition related to the cancelled class.
- d. UNIFORM TUITION REFUND SCHEDULE

1) TUITION AND SPECIAL COURSE FEE REFUND POLICY -  
Regular Academic Semester

The refund period at all institutions shall be 20% of the instructional period (21 calendar days), beginning with the first day of instruction for the semester per the University's Academic Calendar. The instructional period includes all calendar days beginning from the first day of the semester and ending on the last day of instruction.

In the event a student initiates a complete withdrawal from the University (or College), changes from full-time to part-time status, or changes from one tuition rate to another during the three-week refund period, tuition and special course fees are refunded as indicated below:

- a) 100% refund for complete withdrawal only if made on or before the last day of late registration (add period) as established at each institution.
- b) 100% refund for change in status or tuition rate if made on or before the last day of late registration (add period), unless otherwise stipulated by federal regulations.
- c) 50% refund for complete withdrawal or change in status or tuition rate if made after the late registration period (add period) but on or before the end of the refund period (third week of instruction), unless otherwise stipulated by federal regulations.
- d) 0% refund if complete withdrawal or change in status or tuition rate is made after the refund

period, unless otherwise stipulated by federal regulations.

2) MANDATORY STUDENT FEES REFUND POLICY - Regular Academic Semester

- a) 100% refund if complete withdrawal is made system-wide on or before the last day of late registration (add period) as established at the student's home institution.
- b) No refund of mandatory student fees if partial withdrawal is made on or after the first day of the semester.

3) TUITION AND SPECIAL COURSE FEES REFUND POLICY - Non-Semester Long Credit Courses

The refund period at all institutions shall be 20% of the instructional period. The instructional period includes all calendar days beginning from the first day of instruction and ending on the last day of instruction. No refunds will be made for courses where the instructional period is 10 days or less, except before the first day of instruction. Refunds for credit courses that are not semester long shall be as follows:

- a) 100% refund for complete withdrawal only if made on or before the last day of late registration (add period) as established at each institution.
- b) 50% refund for complete withdrawal or change in status or tuition rate if made after the late registration period (add period) but on or before the end of the refund period as defined above, unless otherwise stipulated by federal regulations.

4) MANDATORY STUDENT FEES REFUND POLICY - Non-Regular Academic Semester

- a) 100% refund if complete withdrawal is made system-wide before the first day of the semester.
- b) No refund of mandatory student fees if partial withdrawal is made on or after the first day of the semester.

5) NON-CREDIT COURSES OR WORKSHOPS REFUND POLICY

Refunds for non credit courses or workshops shall be established and published by the respective program offering the course prior to the start of the course or workshop.

- e. Federal financial aid credit balance refunds are determined by refund and repayment rules issued by the U.S. Dept. of Education for Federal Title IV student financial aid programs. Refund and repayment amounts are calculated based upon earned and unearned aid percentages as outlined by the Federal Government. The formula for such calculations is based on the number of days in a given semester and the number of days of attendance completed by the student prior to his/her withdrawal.

5. Procedures

- a. Campus business/cashier offices will review and process any eligible refunds or credit balances reflected on a student account. Pending financial aid for current or future semesters is not refundable.
- b. Title IV credit balance refunds are processed as soon as possible but no later than 14 days after:
  - 1) The date the balance occurred on the student's account, if the balance occurred after the first day of class of a payment period, or the first day of classes of the payment period if the credit balance

occurred on or before the first day of class of that payment period.

- 2) Any excess PLUS Loan funds must be returned to the parent. Therefore, if PLUS Loan funds create a credit balance; the credit balance will be given to the parent. However, the parent may authorize the school to transfer the proceeds of a PLUS Loan directly to the student for whom the loan is made.
- c. Tuition and fee refunds due to a complete withdrawal, change from full-time to part-time, drop in credit hours, or change from one tuition rate to another are processed after the end of the 50% drop period for the semester.
  - d. If a refund results from an overpayment made by a personal check, the refund will be processed after a 15 day wait period or the end of the 50% drop period, whichever is later, to verify the check payment has cleared the University's bank.

6. Minimum Refund Amount

In accordance with Title IV Regulations, 34 CFR 668.164(e), refunds or credit balances under \$1.00 will not be refunded.

7. Payee

- a. Refund checks are payable only to the student, except as noted in 7b, 7c and 7d.
- b. Credit balances that are a result of a Parent PLUS loan will be refunded directly to the parent who is the borrower on the loan, unless the parent has provided written or on-line authorization to the University to transfer the loan proceeds to the student.

- c. Excess payments made by third parties or external sponsor organizations shall be refunded in accordance with that sponsor organization's directives.
- d. Refunds to a deceased student shall be made payable to the estate of the deceased student, provided appropriate documentation is provided.

8. Outstanding Financial Obligations owed to the University

A student, who has an outstanding financial obligation to the University of Hawaii, shall not be refunded until the unpaid obligation is cleared. Any refund will first be applied to unpaid charges owed to the University.