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Owner: *Pierre Neuenschwander:
Senior Associate Provost*
Policy Area: *Academics, Faculty and
Students*

References:

Refunds and Repayments of Tuition and Fees

Scope:

This policy applies to all UTHSCT faculty, staff and students.

Purpose:

To define the UTHSCT policy on tuition and fee refunds and repayments, withdrawals, and return of Title IV funds.

DEFINITION(S):

Census Day: The day of each semester where total student enrollments are determined for reporting purposes. This will typically be the twelfth (12th) class day of a regular semester (fall and spring) or the fourth (4th) class day of a summer term (as indicated in the published academic calendar for that year).

POLICY:

When a refund is warranted, a check covering all refunds due (as determined by the schedules below) will be mailed by the Bursar's Office to the address on file in the Office of Enrollment Services within approximately thirty (30) days. If a student has not paid the total amount of the tuition and mandatory fees charged to the student by the institution for the courses in which the student is enrolled by the date the student withdraws from the institution, instead of issuing the student a refund in the amount required in the schedules below, the institution will credit the amount to be refunded toward the payment of the outstanding tuition and mandatory fees owed by the student. The institution shall issue a refund to the student if any portion of the amount to be refunded remains after the outstanding tuition and mandatory fees have been paid.

Institutional Refund Policy

A student who officially withdraws from the University of Texas Health Science Center at Tyler may be eligible for a refund of tuition and specified fees, based upon the courses in which the student was enrolled on the official date of withdrawal. Refunds are based on the percentage of tuition and fees charged, not on the percentage of tuition and fees paid. A student enrolled in an installment plan will be required to continue making payments until the non-refundable portion of his/her account is paid in full. The University shall terminate student services privileges, such as health services, library privileges and facilities usage, when a student withdraws from the University.

A student who officially withdraws from The University of Texas Health Science Center at Tyler may receive a refund of tuition and fees as outlined in the schedules listed below. The Institutional Refund Policy is enacted under the guidelines of the Texas Education Code, Section 54.006, as amended by the Legislature of the State of Texas in May 1977. The University will refund tuition and fees paid by a sponsor, donor or scholarship to the source rather than directly to the student who has withdrawn.

Schedules of Refunds for Drops or Withdrawals

Drops: Refunds shall be made of applicable tuition and fees collected for courses from which a student drops prior to Census Day for that term, provided the student remains enrolled at the institution.

Complete Withdrawals: Refunds of tuition and mandatory fees shall be made to the students withdrawing completely from the institution during a semester according to the following schedule. The percent refunded is based upon the full payment of all tuition and fees. If full payment has not been made, it is possible that a balance may not be due. Not all fees are refundable beyond the first day of the term.

Fall Term and Spring Term

1. Prior to first day of the term	100% (a \$15 matriculation fee shall be assessed)
2. During the first 5 days of the term	80%
3. During the second 5 days of the term	70%
4. During the third 5 days of the term	50%
5. During the fourth 5 days of the term	25%
6. After the fourth 5 days of the term	No refund

Summer Term

1. Prior to 1st day of the term	100% (minus a \$15 matriculation fee)
2. During the 1st, 2nd, or 3rd day of the term	80%
3. During the 4th, 5th or 6th day of the term	50%
4. During the 7th day of the term and thereafter	No refund

Full refund of tuition and fees will be made if withdrawal is due to death of the student or transfer of the student under military orders.

Withdrawal Policy

A student who wishes to withdraw from The University of Texas Health Science Center at Tyler after completing registration for a term must complete the withdrawal form on *myUTH* and submit the form to the Registrar's Office. The Registrar's Office will process the withdrawal form.

Return of Title IV Funds Policy

When a student withdraws on or before completing 60% of the semester/payment period and received Title IV federal student aid (e.g. Federal Stafford Loan or Plus Loan) the University must determine the percentage of unearned financial aid, as determined by the Federal "Return of Title IV Funds" calculation derived from the 1998 Reauthorization of the Higher Education Act.

Students who drop after the 60% mark in the semester/payment period have earned 100% of the Title IV federal student aid that they were scheduled to receive. Although there are no unearned funds, the University will complete the Return calculation to determine if the student is eligible for a post-withdrawal disbursement. For more information, please refer to the post-withdrawal disbursement section of this policy below.

A student earns Title IV funds in direct proportion to the length of time he/she remains enrolled. The length of time during the semester/payment period that the student remained enrolled is the percentage of aid that the student earned for the semester/payment period. The percentage of unearned aid, which must be returned to the Title IV programs by the institution, is equal to the number of calendar days remaining in the semester/payment period divided by the total number of calendar days in the semester/payment period.

Any Title IV refund for which the student is eligible due to withdrawal will be withheld until Student Financial Services has completed the Return calculation. The Return calculation will determine whether or not a grant overpayment is owed by the student. In the case of a grant overpayment, the institution may hold a Title IV credit balance for more than 14 days, but no longer than 14 days from the day that the school performs the return calculation. The University will reimburse the Title IV funds to the lender for the amount indicated on Step 5, section O of the Return calculation.

Refunds are to be returned to the appropriate lenders or program accounts in the following statutorily specified order as applicable:

- Unsubsidized Federal Direct Stafford Loan
- Federal Direct PLUS Loan (Graduate Student)
- Other federal, state, private or institutional sources of aid
- Student

Procedures

A Return of Title IV Funds calculation will be performed on any student that was disbursed or could have been disbursed Title IV federal student aid (e.g. Federal Stafford Loan Program, Federal PLUS loan Program) and withdraws entirely, or is dismissed from the institution.

Determination of Withdrawal Date

A student must notify the Registrar's Office, in writing, of their intent to withdraw (refer to Withdrawal Policy above).

The withdrawal date is:

- the earlier of the date that the student began the withdrawal process or the date that the student provided official notice to the Registrar's Office; or
- if the student did not notify the Registrar's Office, the withdrawal date is the midpoint of the semester/payment period; or
- if the student did not notify due to circumstances beyond the student's control, the date related to that circumstance; or
- the date of the student's last day of attendance at a documented academically-related activity.

Steps in Return of Title IV Funds Calculation

Step 1: Record the amount of aid disbursed and the amount of aid that could have been disbursed

Step 2: Calculate the percentage of Title IV aid earned

Step 3: Calculate the amount of Title IV aid earned by the student

Step 4: Determine whether the Title IV aid will be disbursed to the student (post-withdrawal disbursement) or returned

Step 5: Calculate the amount of unearned aid due from the school

Step 6: Determine the return of funds by school

Step 7: Calculate the initial amount of unearned Title IV aid due from the student

Step 8: Determine return of funds by student

Step 9: Determine Grant Funds to be returned, if applicable

Step 10: Return of Grant funds by the student, if applicable.

The Return of Title IV funds calculation may be performed on either the Treatment of Title IV Funds When a Student Withdraws from a Credit-Hour Program worksheet or by the Return of Title IV funds software both provided by the Department of Education. Documentation of the calculation will be maintained in the student's electronic file and will be recorded on the Student Financial Services Excel spreadsheet.

Post-Withdrawal Disbursements

Loans

If the Return of Title IV funds calculation determines that the student is due a post-withdrawal loan disbursement, Student Financial Services will notify the student in writing within 30 days from the withdrawal date prior to making any post-withdrawal disbursement. The student must provide a written statement if they wish to accept a post-withdrawal disbursement. The University will apply the post-withdrawal disbursement towards any outstanding current institutional charges before disbursing to the student unless the student indicates otherwise. Once the University receives confirmation that the student accepts the post-withdrawal disbursement, the school will make the post-withdrawal disbursement as soon as possible, but no later than 180 days of the date the school determined the student withdrew. The post-withdrawal disbursement will be mailed or sent via direct deposit to the student.

The student must respond within 14 days of the date the notification is sent to receive the post-withdrawal disbursement. If the student or parent borrower fails to respond, no disbursement will be made. Requests for post-withdrawal disbursements received after the 14 day period will be handled on a case by case basis by the Director or his/her designee. The student or parent borrower will be notified in writing if the late request for a post-withdrawal disbursement is denied.

Post-Withdrawal Notification

Any post-withdrawal notification to student will include the type of post-withdrawal disbursement, outstanding institutional charges (if any), and a direct post-withdrawal disbursement due to the student. The letter will also include, if applicable, information on loan repayment obligations and the option to accept all/portion of funds.

All post-withdrawal disbursement tracking, authorizations, and notifications will be recorded on the Student Financial Service's Excel spreadsheet.

Return of Funds by School

If the student receives an excess of Title IV program funds that must be returned by the school, The University will return to the Title IV funds a portion of the excess as required by the Return of Funds calculation. The University will return this amount even if this amount was sent to the student as a refund. The student will then be required to repay the University for the amount reimbursed to the Title IV funds as an institutional debt. Return of funds to the appropriate Title IV program(s) will be made no later than 45 days after the determination that the student withdrew.

Return of Funds by Student

Loans

If the Return of Funds calculation produces an amount that the student is responsible for returning to the Title IV funds, a written notification will be sent to the student within 30 days of the date the school determined the student withdrew. Specific rules apply to the return of funds to the Title IV programs. Any amounts that are required to be returned to the federal loan programs are repaid in accordance with the promissory note and no further action is necessary. This means that the student will make scheduled payments to the holder of the loans.

Consumer Information

The refund/repayment consumer information will be available on the Student Financial Services website at <https://www.uth.edu/sfs/>. A link to this information will also be made available on our electronic newsletter, “\$en\$e on a Dollar.” In addition, copies of the Return of Title IV funds policy will be made available to students in paper form in the Student Financial Services Office and the Office of Academic Administration.

Reference(s):

UTHSCT General Academic Catalog
Sec. 54.006 Texas Education Code
1988 Reauthorization of the Higher Education Act

Attachments:

[Currently-approved Policy filed with the DOE.](#)

Approval Signatures

Step Description	Approver	Date
Executive Cabinet	Carol Davis: Executive Assistant, Senior	05/2016
Office of Legal Affairs	Terry Witter: VP, Legal Affairs/ChiefLegalOf	05/2016
Deans Council	Michelle Harris: Academic and Admin Support Cor	05/2016
	Pierre Neuenschwander: AVP, Academic Administration	05/2016