Fee Collection, Cancellation, Exchange, and Refund Policy and Procedure

1.0 Purpose
The purpose of this policy is to provide clarity for AboveTraining Inc. employees, partnered health department officials, and end-users. Additionally, this policy will provide AboveTraining Inc. employees the grounds for acceptance or refusal of exchange and/or refund claims by end-users.

2.0 Scope
This policy outlines the procedures for secure fee collection and/or cancellation and the qualifications by which a refund or exchange is deemed appropriate.

3.0 Definitions
For the purposes of this policy, the following definitions and connotations apply:
- “Fee Collection” is understood to mean the process by which the end-user purchases the online course and assessment and how payments are securely processed.
- “Cancellation” is understood to mean a voided transaction.
- “Exchange” is understood to mean the exchange of one online course and assessment for another.
- “Refund” is defined as a credit to a cardholder account, usually as the result of product return or end-user error.
- “Appeal” is defined as a request for reconsideration of an adverse decision.

4.0 Policies
4.1 Fee Collection
All payments must be received utilizing one of the following methods:

- Online Store Purchase
- Phone Credit Card Payment
- Check Payment

Any questions or concerns with this Policy and Procedure document should be referred to the first-line supervisor. If questions are not resolved, follow the organizational chart.
• Cash payments are not permitted.

4.2 Cancellations
• Online payments are not processed by individual credit card issuers until 24 hours after the transaction is initiated. Within this 24-hour window, the end-user may appeal for a cancellation of their purchase.
• A cancellation is only available for end-users who have not entered the online course or assessment who have not been issued a certificate.
• Cancellations are not available after the transaction has been processed. The end-user may choose to appeal for a refund (see 4.4).

4.3 Exchanges
Exchanges are possible in either of two circumstances:
1. End-user immediately recognizes a purchasing error and makes an appeal to Customer Support.
2. End-user does not recognize a purchasing error until they have completed the assessment and printed their certificate.
   • End-user must appeal customer support within 24 hours of completing the incorrect assessment to receive an exchange for no additional charge. However, end-user may be required to pay any additional health department fees resulting from the exchange.
   • If end-user does not appeal to Customer Support until 24 hours after completing the assessment and receiving a certificate, they will be required to pay the entire health department fee of the health department for which they require a certificate. End-user will not be required to pay an additional AboveTraining Inc. course fee.

4.4 Refunds
• End-user may appeal for a refund if they have not yet entered the online course or assessment and have not been issued a certificate.
• End-users who are unable to complete the Certified Food Protection Manager Exam due to a technology- or emergency-related interruption of the proctored exam session (for example, a power outage at the test site) will be eligible to retake the exam at no charge or have their money refunded. Refund appeals are evaluated on a case-by-case basis by customer service personnel as governed by this policy.
• Refunds will not be issued to end-users who have completed their online assessment and received a certificate.
• Refunds will not be issued after 30 days of the initial transaction.
• Refunds will not be issued via cash or check.
• Refunds may only be issued to the end-user account used for the initial transaction.

5.0 Procedures
5.1 Fee Collection

Online Store Purchase
- End-user goes to any website owned by AboveTraining Inc. and selects the online course and assessment they require.
- End-user enters all required registration information including billing information (i.e. credit card number, expiration date, etc.).
- End-user submits payment upon review of registration and billing information.
- Online payments are processed through Authorize.Net®.
- End-user is emailed an order confirmation and receipt of payment.
- End-user begins course.

Phone Credit Card Payment
- End-user may call in and make a payment over the phone.
- Phone payments are processed through Authorize.Net®.
- End-user is emailed a receipt of payment.
- End-user is emailed a username and password to access the course.

Check Payment
- End-users may choose to mail a check to AboveTraining Inc. for the exact amount of the course they wish to purchase.
- End-user must provide their full name, the course they wish to purchase, and a phone number where they can be reached during business hours.
- Customer support contacts end-user to set up account and assign course.
- Customer support emails username and password.

5.2 Cancellations
- An Accounting or Client Services or Customer Support Representative will cancel (void) the transaction and the payment will never be processed by the credit card issuer.
- The end-user account is deactivated.

5.3 Exchanges
- End-user immediately recognizes a purchasing error (e.g. purchased California course, but needed San Bernardino course).
  - Customer support changes the learner group to which the end-user has been assigned. End-user may be required to pay additional health department fee (see 4.3.2).
  - The previous assessment is no longer available.
  - End-user is required to complete the new assessment with a passing score to receive a certificate.
- End-user does not recognize a purchasing error until they have completed the assessment and printed their certificate.
Customer support takes end-user payment over the phone, emails the receipt of payment, and changes the student group to which the end-user has been assigned.

- The previous assessment will no longer be available and the certificate will be deactivated.
- End-user is required to complete the assessment with a passing score to receive the new certificate for the health department they have requested.

5.4 Refunds

- Appeal decision cannot be made by Customer Service Representative. However, it can be carried out by a Customer Service Representative with approval from Accounting or Client Services Coordinator or a member of the Senior Management Team.
- Transaction is refunded.
- End-user account is deactivated.
- Email notification of refund is sent to end-user.

6.0 Reporting

- [Previous items have been removed]

7.0 Related Documents

- Information Sensitivity Policy and Procedure
- Complaints and Appeals Policy and Procedure

8.0 Revision History

4/27/2016 – Updated to include CFPM info.


5/17/2018 – Minor change to properly identify the Senior Management Team