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| <b>Date Created:</b>      | April 10, 2011  | <b>Created by:</b>  | NARA               |
| <b>Last Revision:</b>     | August 10, 2021 | <b>Revised by:</b>  | Executive Director |
| <b>Date Approved:</b>     | August 17, 2021 | <b>Approved by:</b> | NARA BoD           |
| <b>Proposed Revision:</b> |                 | <b>Proposed by:</b> |                    |

# REFUND AND CREDIT POLICY

## Purpose Statement

The purpose of this policy is to provide fair and reasonable refunds and/or credits while acknowledging costs incurred by NARA.

## Webinars

Webinar registration fees are due at the time of registration. In order to be eligible for refund, the written request must be received at least five (5) business days prior to the day the webinar is scheduled to occur. All refunds will be subject to a processing charge of \$25.00 (US Funds).

Late cancellations are not refundable, but attendance may be transferred to a colleague who is eligible at the same fee rate based on membership status if done at least one (1) business day prior to the scheduled webinar. No-shows will not be eligible for refund or transfer.

## Membership Fees

Membership fees are due upon submission of an initial or renewal membership application. Membership fees are non-refundable.

## Materials and Supplies

Payment is required at the time of purchase for any materials or supplies, including but not limited to handbooks, guides, best practices, raffle and auction items, promotional items, etc. These purchases are final and are non-refundable.

## Credential and Other Courses

Credential and other course fees are due at the time of registration. In order to be eligible for refund, the written request must be received either within ten (10) business

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days of the completion of the registration, or at least five (5) business days prior to the start day of the course, whichever occurs first. For self-paced courses the request must occur prior to starting the course, and no more than ten (10) business days after registration occurs.

All refunds will be subject to a processing charge of \$25.00 (US Funds).

Late cancellations are not refundable, but attendance may be transferred to a colleague who is eligible at the same fee rate based on membership status if done at least one (1) business day prior to the scheduled course. No-shows will not be eligible for refund or transfer.

**Bulk Purchases:** Only organizations may make bulk purchases for courses and/or the comprehensive exam for the National Regulatory professional Credential (NRPC). Bulk purchases are expected to be paid on time and in full and include the following conditions:

- a. Course and exam transfers are permissible; see restrictions in transfer section below.
- b. Access to a course or the NRPC comprehensive exam lasts for one (1) calendar year from the date the candidate is provided access.
- c. Transfers for courses or the exam to another candidate are allowed, dependent upon used access for a course or exam. Once accessed, the course or exam is no longer transferable.
- d. Access is defined as a candidate logging into the course database using the login credentials provided.
- e. If a course or the exam has been:
- f. Accessed: no transfer is allowed of any course or exam; purchase has been used.
- g. Not Accessed: Transfer is allowed for any un-accessed course or exam; purchase is considered unused.

**Transfers:** There is no limit on the number of transfers made within the one (1) year timeframe from the invoice issue date.

1. Transfers are allowed at no additional cost to organizational members.
2. Transfer requests must be received in writing before the one (1) year invoice issuance date is up.

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- Candidate to take transfer course or exam needs to be identified within 12 months from initial bulk order invoice issue date.

## Licensing Seminars/Conferences

Licensing seminar/conference registration fees are due at the time of registration. Any discounts are applied at the time of registration and will not be applied retroactively.

Substitutions for registrants at a seminar/conference are permitted for a colleague who is eligible at the same fee rate based on membership status and may be made up until five (5) business days prior to the start of the seminar.

Cancellations must be received in writing and are subject to the following:

- Cancellations received eleven (11) business days or more prior to the seminar/conference are eligible for a refund minus a processing charge of \$75.00 (US funds).
- Cancellations received ten (10) business days or less prior to the start of the seminar/conference shall not receive any refund if they do not meet the criteria in number 3 below.
- Cancellations received ten (10) business days or less prior to the start of the seminar/conference shall receive a credit to the next NARA Seminar/Conference equal to the fee for the cancelled seminar/conference minus a processing charge of \$125.00 (US Funds), only if the cancellation was due to:
  - Events beyond reasonable control of the registrant, including but not limited to: acts of God, acts of war, terrorist attacks in the region where the seminar/conference is being held or the region where the individual works and or lives, government regulation, a declared national/state/provincial/territorial disaster, transportation strike, or curtailment of transportation either in the seminar/conference city or in the country/state of origin of the attendee, civil disorder, or other emergency that makes it illegal or impossible to attend the seminar/conference; or

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- Death of an immediate family member. For the purpose of this policy this means a family member who is:
  - a. a spouse, domestic partner;
  - b. children, step children, foster child, or a child in an “in loco parentis” arrangement for which the person assumes parental status and responsibilities;
  - c. an individual for which the person is a legal guardian for;
  - d. parents, brothers, sisters, step-parents, step-brothers, step-sisters, mother-in-law, father-in-law, brother-in-law, sister-in-law, grandparents, grandchildren; or
  - e. any relative living in the registrant's domicile.
- 4. In the event a Seminar participant is unable to participate in the event, either prior to or after commencement of the event, due to illness, including, but not limited to COVID, the flu, etc., and the event is available virtually either live streamed or recorded, the participant will not be eligible for a refund or credit.
- 5. Requests for refunds pursuant to number 3 above must be received in writing, with supporting documentation, within twenty-eight (28) business days of the end of the seminar/conference. Supporting documentation may include a copy of a leave slip indicating the reason for leave, letter from their employer stipulating to the death or the obituary of the decedent.

## Additional Information

Should NARA cancel the course, program or Seminar the full registration fee without a processing charge shall be refunded; unless requested otherwise by the individual or agency, to be used as credit within a 12-month period on future courses or program.

In the event a fee that has been paid is not in the listed categories, the Executive Director, who makes the decision on all refund and credit requests, will apply the most closely associated policy to the situation. Written requests may be submitted by mail, or e-mail. Phone cancellations and or requests for fee return will not be accepted.



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Any appeal of the Executive Director's decision shall be reviewed on a case-by-case basis by the full Board of Directors. The decision on the appeal shall be made by the Full Board of Directors and decided by majority vote.