

**STUDENT FINANCIAL APPEALS  
CHECKLIST/FORM**

|                            | STU<br>✓ | SAC<br>✓ |              |  |
|----------------------------|----------|----------|--------------|--|
| <b>STUDENT INFORMATION</b> |          |          | REQUEST DATE |  |
|                            |          |          | STUDENT NAME |  |
|                            |          |          | ADDRESS      |  |
|                            |          |          |              |  |
|                            |          |          | EMAIL        |  |
|                            |          |          | PHONE        |  |
|                            |          |          | STUDENT ID   |  |

|                           |  |  |                                  |  |
|---------------------------|--|--|----------------------------------|--|
| <b>COURSE INFORMATION</b> |  |  | SEMESTER/YEAR                    |  |
|                           |  |  | LAST CLASS DATE OF SEMESTER/YEAR |  |
|                           |  |  | CLASS NAME                       |  |
|                           |  |  | CLASS NUMBER                     |  |
|                           |  |  | ADVISOR NAME                     |  |
|                           |  |  | ADVISOR PHONE                    |  |

|                |  |  |         |  |
|----------------|--|--|---------|--|
| <b>REQUEST</b> |  |  | REQUEST |  |
|                |  |  | AMOUNT  |  |
|                |  |  | REASON  |  |

|                  |  |  |  |  |
|------------------|--|--|--|--|
| <b>RATIONALE</b> |  |  | 9 WKS/45 DAYS?                                 |  |
|                  |  |  | MEDICAL  |  |
|                  |  |  | MISINFORMATION                                 |  |
|                  |  |  | ERROR  |  |
|                  |  |  | MILITARY                                       |  |
|                  |  |  | FAMILY/HOUSEHOLD                               |  |
|                  |  |  | DISASTER                                       |  |
|                  |  |  | WORK SCHEDULE                                  |  |
|                  |  |  | 2ND APPEAL                                     |  |
|                  |  |  | IF 2ND APPEAL, WHEN WAS 1ST? WHAT IS NEW INFO? |  |

**FOR SAC USE ONLY:**

|                     |              |  |                               |
|---------------------|--------------|--|-------------------------------|
| <b>SAC Decision</b> | Approved     |  | Reason for Approval or Denial |
|                     | Denied       |  |                               |
|                     | Date Decided |  |                               |
|                     |              |  |                               |

## **Student Financial Appeals Guidelines and Process**

1. **TIMING** - Financial appeals requests must be made within 9 weeks (45 business days) of the last class day of the semester for which the student is appealing, including mini semesters.
2. **SUPPORTING DOCUMENTATION** – Financial appeals requests must be submitted in writing on the Student Financial Appeal Checklist Form, and should include all relevant documentation that supports their reason for making the request.
3. **REVIEW** – Financial appeals will be reviewed when submitted within the 9-week (45 business days) time frame, and with supporting documents, on a rolling weekly basis. Should the review committee need additional information, or have additional questions, they will reach out to the student via the student's UHCL email address within 10 business days.
4. **REFUND DEADLINES** – Tuition and fee refund deadlines are set by Texas law: Chapter 54, Subchapter A, Section 54.006. Students may not receive a refund for courses they have *dropped or withdrawn* from after these dates, unless:
  - a. **Medical exception** – A medical condition made it *impossible* for a student to drop or withdraw from the university course by the deadline;
  - b. **Misinformation** – UHCL faculty or staff *acknowledge* that they provided incorrect information or advisement;
  - c. **Error** – UHCL calendar, syllabus, or departmental communication, or similar publication contained an erroneous deadline;
  - d. **Military Service** – The student is called to active duty and cannot complete the course, or drop/withdraw *timely*;

- e. **Significant family event** – The student has a *death or major disturbance* in the immediate family or household;
  - f. **Natural disaster** – A natural disaster has occurred that prevents the student from completing, dropping or withdrawing from the course(s);
  - g. **Change in work schedule** – A change in work days or hours prevents the student from completing course(s) as initially planned.
5. **REFUND DEADLINE EXCEPTIONS** – If a student requests a refund based on a *medical condition that occurs or extends beyond the deadline* then their request will be reviewed and evaluated based on the facts at issue, on a case-by-case basis.
6. **DOCUMENTATION EXAMPLES** –
- a. Medical reports from healthcare provider such as office visit, emergency room, urgent care notes that address the specific illness and timing of illness and service provision;
  - b. Death certificate; legal papers related to divorce or adoption or custody hearings;
  - c. University publication containing error;
  - d. Email, memo, letter acknowledging incorrect advisement;
  - e. Military deployment papers;
  - f. Memoranda or letters from employers describing schedule changes for the student-employee;
  - g. Other relevant documents, including dates, times and contact names for telephone conversations with advisors, faculty and/or UHCL staff. Email documentation is preferred.

## 7. **PROCESS** –

- a. Student submits complete appeal package online or in person at Student Business Services office using a Student Financial Appeals Checklist Form;
- b. Student Appeals Committee (SAC) reviews submissions, usually weekly;
- c. SAC may decide the matter within the week (if submitted by Wednesday), or request additional information from the student;
- d. If the appeal is approved the Registrar will adjust the student's academic record as appropriate. Student Business Services will process the corresponding refund on the next business day. It may take several business days for the student to see the refund amount in their bank account after submission to Bank Mobile, or on their credit card.
- e. If the refund is not granted because of request timing or lack of support documentation the student may request a second appeal by SAC within 3 weeks (15 business days) of the denial if they have additional support documentation to offer. They should clearly identify the new information and why it supports their request.
- f. The decision of the SAC is final

## 8. **REFUND PAYMENT** – If the student has an outstanding balance for that semester, then the payment will be applied as follows:

- a. To UHCL for the outstanding balance
- b. Then remainder, if any, to the student via Bank Mobile or by credit card if the original payment was made by credit card.

## 9. **RECORD RETENTION** – SAC maintains a history of requested appeals and results. The registrar maintains the corresponding support documentation in compliance with Texas document retention policies.

10. **UPDATES** – These guidelines, processes and policies will be reviewed, and may be revised, if necessary, annually by SAC.