

# Sentral Finance – Refunds



## Key highlights

### Why use this feature?

Process refund requests to facilitate payment post approval.

### What this feature offers

Ability to refund payments via EFT and online – through the Department and EFTPOS in schools

Transparency for payment refunds via an authorisation workflow and reporting

4. In Confirm Refund Details:
  - a. Enter details for the refund.
  - b. Select Proceed.

The Refund Status displays as Pending Approval and the refund request workflow is initiated.



**Note:** Once the workflow is initiated, the request displays in the Refunds Register for the designated approver to review and action.

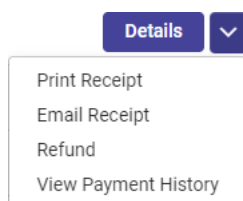
## Pre-requisites

- Fee created
- Payment made (full or partial)
- Fee cancelled and Credit created

## Payments register

### Process a refund




1. Go to Finance module | Registers | Payments Register.
2. Do one of the following to locate the payment and fee.
  - a. Select search criteria, and then select Filter. Payments matching your search criteria are listed.
  - b. Search for the student via the top right-hand search box. The Student Overview screen displays.
    - i. Select Payments in the left menu.
    - ii. Under Payments, locate the payment. Apply filters to refine your search if required.
3. Next to the payment, and Details, select the arrow and choose Refund.



## Refunds register

### Approve and process a refund

To approve all refund requests including online (Portal), EFT and EFTPOS:

1. Go to Finance module | Registers | Refunds Register.
2. Under Filters, select Pending, and then select Filter.
3. Transactions with the status Pending Approval are listed. Authorised users have permission to action refund requests.
4. Select View (  ) next to a refund request to review details, and then select Close.
5. Select an action for the refund request:
  - Approve (  )  
Select Approve in the popup that displays.
  - Reject (  )  
Enter a reject reason in the popup that displays, and then select Reject.

The (refund) status is updated to either Approved or Rejected.

6. Under Filters, next to Status, select Approved and then select Filter.  
Refund requests with the status Approved are listed.

7. Select Process next to a request, and then select Process in the popup that displays.

This communicates the refund request to the Department (for payment).

The (refund) status is updated to Processing. It is updated to Completed when the refund is actioned by the Department with the funds paid to the recipient.



**Note:** *This payment may take the Department a couple of days.*

## Need more information?

[Finance User Guide](#)