

# **Withdrawals**

## **Training Manual**

### **GINA**

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## INTRODUCTION

Withdrawals are processed from the [Withdrawals / Terminations](#) menu. School, division and regional coordinators, school and division finance administrators and Green Certificate program administrators can process withdrawals.

A **withdrawal** is normally initiated by the trainee. They have an active registration but have decided to withdraw from the program. There are many reasons for a trainee to withdraw including a high workload or loss of interest in the program.

A **termination** is initiated by the regional coordinator. An active registration is terminated for different reasons. For example, the trainee has not written an exam in the first year or has not completed the program in three years.



- The [Create Withdrawal Request](#) activity allows you to enter a new withdrawal request.
- The [Process Withdrawal Requests](#) activity allows you to review, approve or reject a withdrawal request.
- The [Maintain Withdrawal Requests](#) activity allows you to search for withdrawal requests.

### Withdrawal Business Process

Withdrawal requests can be created for registrations with a status of active that do not already have a withdrawal or termination request. Withdrawals may be entitled to a refund, depending on:

- Which refund policy was in effect at the time the registration was approved for invoicing; and/or
- Which Refund Policy Milestones were achieved or not, at the time of the Withdrawal request

The registration status changes to withdrawn when the withdrawal request is approved. If a refund is applicable, it is either:

- Manually processed by the Green Certificate program administrator; or
- Automatically calculated by the GINA system

When the registration status is withdrawn, it cannot be set back to Active. Instead a new pre-registration would be created.

## CREATE WITHDRAWAL REQUEST

Withdrawals are entered by the school and division coordinators, school and division finance coordinators and the regional coordinators.

1. Click the *Withdrawal / Termination* menu and the *Create Withdrawal Request* activity.

The screenshot shows a navigation menu with the following items: Home, Persons, Schools / Divisions, Campaigns, Registrations, Testing, Withdrawals / Terminations, Reports, and System. The 'Withdrawals / Terminations' menu is expanded, showing a list of activities: 'Create Withdrawal Request' (highlighted with a red box), 'Process Withdrawal Requests', and 'Maintain Withdrawal Requests'. The text 'Select an activity from the left.' is displayed to the right of the menu.

2. The *Search Registration* screen is shown.

The screenshot shows the 'Search and Select a Registration to Create a Withdrawal Request' screen. It features a search form with the following fields: 'Select Region --', 'Select School --', 'Select Specialty --', 'First Name', 'Last Name', and 'Select Town/City --'. A search button is located to the right of the 'Select Town/City --' field. Below the search form is a table with the following columns: School, Specialty, Registration Status, Full Name, Town/City, and Registration Date. The table is currently empty. At the bottom of the screen, there is a pagination control showing 'Page 1 of 0' and a 'Create Withdrawal Request' button.

3. Enter search criteria and click **Search**. Registrations with a status of Active, that do not already have a withdrawal or termination request and that you have access to are displayed.

Search and Select a Registration to Create a Withdrawal Request

-- Select Region --    St Paul Regional High School    -- Select Specialty --

First Name    Last Name    -- Select Town/City --    

School	Specialty	Registration Status	Full Name	Town/City	Registration Date
St Paul Regional High School	Swine Farrow to Finish	Active	Joseph VA . Anderson	St. Paul	2015-05-12
St Paul Regional High School	Field Crop	Active	Rhonda Smith	St. Paul	2015-05-06
St Paul Regional High School	Feedlot	Active	Elizabeth VA . Pasay	St. Paul	2015-05-12

4. Select the registration and click **Create Withdrawal Request**.

Search and Select a Registration to Create a Withdrawal Request

-- Select Region --    St Paul Regional High School    -- Select Specialty --

First Name    Last Name    -- Select Town/City --    

School	Specialty	Registration Status	Full Name	Town/City	Registration Date
St Paul Regional High School	Swine Farrow to Finish	Active	Joseph VA . Anderson	St. Paul	2015-05-12
St Paul Regional High School	Field Crop	Active	Rhonda Smith	St. Paul	2015-05-06
St Paul Regional High School	Feedlot	Active	Elizabeth VA . Pasay	St. Paul	2015-05-12

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5. The *Create Withdrawal Request* form is displayed. Registration information is shown.

**Create Withdrawal Request**

**Registration Information**

<b>Registration ID</b>	<b>Status</b>	<b>Registration Date</b>	
<input type="text" value="31"/>	<input type="text" value="Active"/>	<input type="text" value="2015-05-12"/>	
<b>First Name</b>	<b>Last Name</b>	<b>Town/City</b>	<b>Email Address</b>
<input type="text" value="Elizabeth"/>	<input type="text" value="Pasay"/>	<input type="text" value="Town/City"/>	<input type="text" value="elizabethpasay@ard.com"/>
<b>Specialty</b>	<b>Level</b>	<b>Target Start Term</b>	<b>Target Start Year</b>
<input type="text" value="Feedlot"/>	<input type="text" value="Feedlot I"/>	<input type="text" value="2015"/>	<input type="text" value="Summer"/>
<b>School</b>	<input type="text" value="St Paul Regional High School"/>		

**Withdrawal Request**

<b>Termination Type</b>	<b>Request Date</b>
<input type="text" value="Withdrawal"/> ▼	<input type="text" value="2015-05-12"/>
<b>Termination Status</b>	
<input type="text" value="Unrpocessed"/> ▼	
<b>Termination Reason *</b>	
<input type="text" value="-- Select Termination Reason --"/> ▼	
<b>Termination Comments</b>	
<input type="text" value="Termination Comments"/>	

6. Select a *Withdrawal Reason* and enter *Withdrawal Comments*. The *Request Date* defaults to the current date.

*Withdrawal Comments* are mandatory if the *Withdrawal Reason* is 'Other'.

The screenshot shows a form titled "Withdrawal Request". It contains the following fields:

- Termination Type:** A dropdown menu with "Withdrawal" selected.
- Termination Status:** A dropdown menu with "Unprocessed" selected.
- Request Date:** A date input field containing "2015-05-12".
- Termination Reason \*:** A dropdown menu with "Trainee lost interest in program" selected.
- Termination Comments:** A large text area with the placeholder text "Termination Comments".

Above screen should be changed to following:

This screenshot is an annotated version of the form above. Red boxes highlight the labels for "Termination Type", "Termination Status", "Termination Reason \*", and "Termination Comments". A green callout box with a white background contains the text: "Field Labels should be labeled 'Withdrawal' instead of 'Termination' on this Withdrawal screen. Note, screen may be shared with Terminations, so field labeling may need to be dynamic." Red arrows point from this callout box to each of the four highlighted labels. The form content is updated as follows:

- Termination Type:** "Withdrawal" (highlighted)
- Termination Status:** "Withdrawn" (highlighted)
- Termination Reason \*:** "Trainee has graduated" (highlighted)
- Termination Comments:** "gone" (highlighted)
- Request Date:** "2015-09-15"

- Click **Save**. The Process Withdrawal Request section is shown at the bottom of the form, which includes information about tests the trainee has taken or been scheduled for. **Approve** and **Reject** buttons are now available.

Process Withdrawal Request

Invoice Division?

Invoice Contact

<b>Entity to Invoice</b>		<b>Town/City</b>	
<input type="text" value="St Paul Regional High School"/>		<input type="text" value="St. Paul"/>	
<b>Contact Email Address</b>	<b>Contact First Name</b>	<b>Contact Last Name</b>	<b>Contact City/Town</b>
<input type="text" value="Contact Email Address"/>	<input type="text" value="Nick"/>	<input type="text" value="Charles"/>	<input type="text" value="St. Paul"/>

Test Results

Test Site	Test Date	Unit	No Show?	Incomplete?	Average

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Refund Request  
 Refund requests will be approved or denied based on Refund Policy [i](#)

✓ Approve
✗ Reject
✓ Save
⌂ Close

Refunds – refer to “Appendix A – Refund Processing” for refund processing details.

- Click **Approve** and the registration status and the withdrawal request status changes to Withdrawn.  
 A notification appears on the Regional Coordinator’s dashboard.  
 If a refund was requested an email is sent to the Green Certificate program administrator.
- Click **Reject** and the registration status remains Active. The withdrawal request status changes to Cancelled.

## PROCESS WITHDRAWAL REQUESTS

The [Process Withdrawal Request](#) activity displays the withdrawal requests with a status of Unprocessed that you have access to (i.e. those that have been entered but not approved or rejected yet).



You can see withdrawal requests that you have created. School coordinators can see withdrawals for registrations linked to their school. Regional coordinators can see all withdrawals.

1. Click [Process Withdrawal Request](#).

Home Persons Schools / Divisions Campaigns Registrations Testing Withdrawals / Terminations Reports

> Create Withdrawal Request  
> Process Withdrawal Requests  
 > Maintain Withdrawal Requests

Select an activity from the left.

2. A list of requests with a status of Unprocessed that you have access to is displayed.

Select an Unprocessed Withdrawal Request to Update

-- Select Region --  -- Select School --  -- Select Specialty --

First Name  Last Name  -- Select Town/City --

I	Termination Reason	Termination Status	Refund Request	Refund Status	School	Specialty	Registration Status	Full Name	Town/City	Registration Date
3	Trainee has left school	Unprocessed	No		Johny Bright	Business of Agriculture	Active	Nora VA . Cl	St. Paul	2015-05-08

3. Select the withdrawal request and it is highlighted in yellow. Click [Process Withdrawal Request](#) to display the withdrawal. This allows you to update, approve or reject the request.

Select an Unprocessed Withdrawal Request to Update

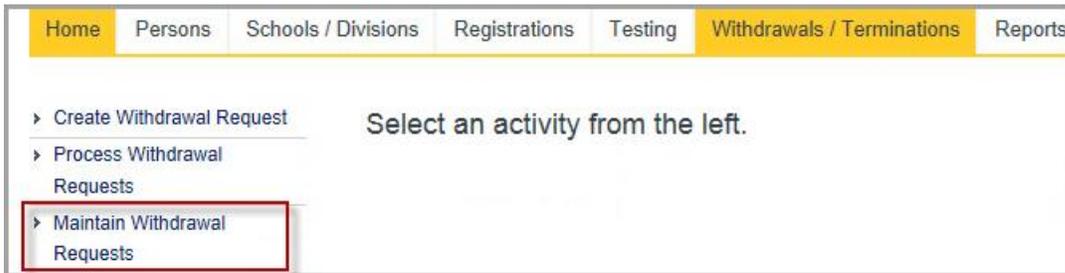
I	Termination Reason	Termination Status	Refund Request	Refund Status	School	Specialty	Registration Status	Full Name	Town/City	Registration Date
3	Trainee has left sc	Unprocessed	No		Johny Bright	Business of Agri	Active	Nora VA . Cl	St. Paul	2015-05-08

## MAINTAIN WITHDRAWAL REQUESTS

Withdrawal requests can be viewed using the [Maintain Withdrawal Request](#) activity.

 You can see withdrawal requests that you have created. School coordinators can see withdrawals for registrations linked to their school. Regional coordinators can see all withdrawals.

1. Click [Maintain Withdrawal Requests](#).



The screenshot shows the application's navigation menu. The 'Withdrawals / Terminations' tab is selected. On the left, there is a list of activities: 'Create Withdrawal Request', 'Process Withdrawal Requests', and 'Maintain Withdrawal Requests'. The 'Maintain Withdrawal Requests' item is highlighted with a red box. The main content area displays the text 'Select an activity from the left.'

2. The [Search](#) form is displayed. There are no default search criteria. Enter criteria and click [Search](#).



The screenshot shows the 'Select a Withdrawal Request to Update' search form. It contains several dropdown menus: 'Select Region', 'Select School', 'Select Specialty', 'Select Termination Status' (with 'Withdrawn' selected), and 'Select Refund Status'. There is also a text input field for 'Last Name' and a dropdown for 'Select Town/City'. A search button with a magnifying glass icon is highlighted with a red box.

3. The example below shows withdrawal requests where the status is withdrawn.

Select a Withdrawal Request to Update

-- Select Region --    -- Select School --    -- Select Specialty --

First Name    Last Name    -- Select Town/City --

Withdrawn    -- Select Refund Status --    

II	Termination Reason	Termination Status	Refund Request	Refund Status	School	Specialty	Registration Status	Full Name	Town/City	Registration Date
1	Trainee has gra	Withdrawn	Yes	Denied	tcSchool	Beekeeping	Withdrawn	TraineeFirstName T . TraineeL	unknown	2015-05-08
2	Trainee has gra	Withdrawn	Yes	Approved	Johny Brig	Sheep	Withdrawn	TraineeMay08 DS . TraineeMay	Edmonton	2015-05-08
4	Trainer no long	Withdrawn	Yes	Denied	Johny Brig	Equine	Withdrawn	TraineeRejectRefundPA Trainee	Edmonton	2015-05-08
5	Trainee course	Withdrawn	Yes	Pending	Johny Brig	Feedlot	Withdrawn	TraineeMay08Feedlot TraineeM	Edmonton	2015-05-08
7	Other (docume	Withdrawn	Yes	Pending	tcSchool	Beekeeping	Withdrawn	TraineeFirstName T . TraineeL	unknown	2015-05-08
21	Trainee course	Withdrawn	No		St Paul Re	Cow-Calf Bee	Withdrawn	Nora VA . Charles	St. Paul	2015-05-11
36	Trainer has left	Withdrawn	Yes	Denied	St Paul Re	Beekeeping	Withdrawn	Elizabeth VA . Pasay	St. Paul	2015-05-12
37	Trainee course	Withdrawn	Yes	Pending	St Paul Re	Dairy	Withdrawn	Elizabeth VA . Pasay	St. Paul	2015-05-12

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4. Select the appropriate row and click [Update Withdrawal Request](#) to display the withdrawal. This allows you to update, approve or reject the request.

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## APPENDIX A – REFUND PROCESSING

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Refund processing is dependent on whether:

- a) Refund is applicable to the **OLD** refund policy. The old policy allowed full or half refund amounts as follows:
  - a. Full refunds were provided if trainee withdrew prior to participating in any Green Certificate Testing activities
  - b. Half refunds were provided if trainee withdrew after participating in **ONLY ONE** Certificate Testing activity
- b) Refund is applicable to the **NEW** refund policy. The new policy has 4 refund milestones. The GINA system automatically:
  - a. Tracks the occurrence of these refund milestones
  - b. Calculates refund amounts based on the “system configurable”:
    - i. Registration amount which was initially invoiced for the registration; and
    - ii. Refund milestone “percentage of registration amount” in effect

### Refund Processing – Old Refund Policy

All registrations are considered applicable to the OLD refund policy, if the registration is “Approved for Invoicing” by the Financial Coordinator “prior to September 1, 2017. Refund processing for these registrations as follows:

1. Click [Refund Request](#), if you want to request a refund. The refund policy can be seen by clicking the [information icon](#). The policy information opens in a new tab.



The [Process Refund Request](#) section is added to the Withdrawal screen. This section is read-only unless you are the Green Certificate program administrator:

Process Refund Request

**Refund Id**  
42

**Refund Status**  
Pending

**Refund Status Reason \***  
-- Select Refund Status Reason --

**Refund Date \***  
Refund Date

**Refund Comments**  
Refund Comments

**Invoice Number**  
Invoice Number

**Refund Type**  
-- Select Refund Type --

**Revenue Refund Amount**  
Revenue Refund Amount

**Tax Amount**  
Tax Amount

**Total Refund Amount**  
0.00