

# SOP Template: Student Payment Follow-Up and Reminders Protocol

This SOP establishes the **student payment follow-up and reminders protocol**, detailing systematic procedures for tracking outstanding payments, issuing timely reminders, managing communication with students regarding dues, and ensuring efficient collection processes. The objective is to maintain accurate financial records, minimize payment delays, and promote transparent, respectful interactions with students to support the institution's financial health and student satisfaction.

## 1. Purpose

To define procedures for effectively tracking and following up on student payments, ensuring timely collections, and fostering clear, respectful communication regarding outstanding dues.

## 2. Scope

This protocol applies to all student accounts with the institution, encompassing tuition, fees, and any other student-incurred charges.

## 3. Responsibilities

- **Accounts/Finance Department:** Monitors outstanding balances, sends reminders, records payments, escalates delinquencies.
- **Academic Advisors/Student Services:** Supports communication with students on payment-related holds or issues.
- **Students:** Responsible for timely payment of all dues.

## 4. Procedures

### 4.1 Data Review and Tracking

1. Download/update list of outstanding student payments from the financial system weekly.
2. Verify data accuracy (names, amounts, due dates, contact info).
3. Update payment logs with any new transactions or communications.

### 4.2 Reminder Schedule and Communication

Timing	Action	Communication Method
7 days prior to due date	Send 1st payment reminder	Email/SMS
On due date	Send due date notice	Email/SMS
7 days overdue	Send 2nd reminder	Email/Phone Call
14 days overdue	Final reminder/warning of possible penalty or hold	Email/Phone Call
21+ days overdue	Escalation to collections or academic hold	Email/Official Letter/Phone Call

### 4.3 Sample Communication Templates

**Email/SMS Subject:** Friendly Reminder: Outstanding Payment for [Term/Service]

**Body:**

Dear [Student Name],

Our records indicate an outstanding payment of [Amount] due on [Due Date]. Please make the necessary payment at your earliest convenience. If you have already paid, kindly disregard this message.

For questions or assistance, contact [Finance Office Contact Info].

Thank you,  
Finance Office

**Note:** Always personalize communication respectfully and comply with privacy/confidentiality policies.

#### **4.4 Recording Communications**

1. Log each reminder sent, including date/time and method.
2. Record student responses or payment arrangements made.
3. Update payment status in the tracking system accordingly.

#### **4.5 Escalations**

1. If payment remains outstanding after final reminder, escalate to the appropriate authority (collections, academic office, etc.).
2. Send official notification detailing next steps and possible consequences (e.g., service holds, late fees).

### **5. Documentation and Records**

- Maintain secure records of all correspondence, payment logs, and actions taken for audit and compliance.
- Retain documentation following institutional and legal requirements.

### **6. Review and Improvement**

- Regularly review the effectiveness of the process, response rates, and payment outcomes.
- Make improvements based on feedback and observed challenges.

### **7. References**

- Institutional Payment and Collections Policy
- Data Protection/Privacy Policy