



# Advisory Report 2016-1

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## Establishing Student Account Policy Manuals

Establishing formal policies and procedures is one way to ensure that an office operates efficiently and effectively. The bursar office is no exception. With many front-line staff, it is essential to have a comprehensive set of guidelines to help deliver first-rate customer service.

NACUBO's Student Financial Services Council has compiled the following recommendations for institutions to consider when developing policies and procedures manuals. This template is a tool designed to help you document important practices related to the student account—or bursar—operation. While this document does not include model policy language, it provides a listing of the various topics institutions may consider to develop policies to address. Institutions may also elect to use this as a guide for developing a training program for staff in the student accounts office.

NOTE: This sample language is also available in a Microsoft Word document to make it easier for NACUBO members to utilize in framing their own manuals.

# Sample Policies & Procedures Manual

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