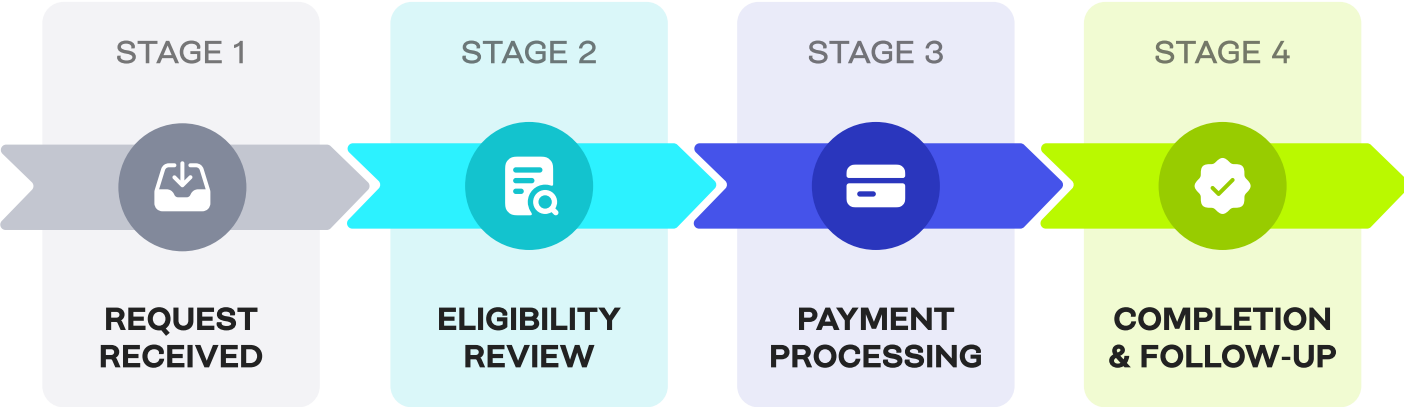# Travel Refunds Standard Operating Procedure

COAX

Checklist

SOP checklist for hassle-free travel refunds

The COAX team prepared an easy-to-use travel refunds SOP checklist template that your team can use daily. Save this checklist and train your staff on resolving any refunds requests with a structured, step-by-step methodology. The checklist contains the ultimate objectives, "who does what" instructions, actions to be taken, and the decision matrix for each situation.

REFUND REQUEST STANDARD OPERATING PROCEDURE

STAGE 1	STAGE 2	STAGE 3	STAGE 4
REQUEST RECEIVED	ELIGIBILITY REVIEW	PAYMENT PROCESSING	COMPLETION & FOLLOW-UP

Goal: Resolve 90% of requests within 7 business days: Keep "Where's my refund?" tickets under 5%.

STAGE 1:
## REQUEST RECEIVED (0-1 hour)

Who:

Automated process

Actions:

- [ ] Send "Request Received" notification email with expected timeline and tracking link

- [ ] Assign claim number and log on to the refund dashboard

- [ ] Flag any refund requests $1000 or greater for priority review

- [ ] Send confirmation SMS with case number

SLA target:

Notification sent within **1 hour** of request submission
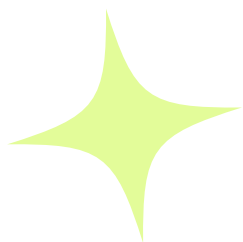
STAGE 2:
ELIGIBILITY REVIEW (1-24 hours)

Who:

Refund team lead or automated rules engine

Actions:

- ☐ Check refund eligibility with the policy table
- ☐ Review supporting documentation (photos, messages, dates)
- ☐ Verify booking status and payment information
- ☐ Approve/deny the refund decision or flag for manual review
- ☐ Send "Approved" or "Need Info" notification email

Refund Decision Matrix:

Condition	Decision
Property uninhabitable/unsafe	Gross refund is approved 100%
Property not available at check-in time	Gross refund is approved 100%
Cancel reservation 24 hours or greater prior to check-in time	Approved per cancellation policy
Cancel reservation less than 24 hours prior to check-in time	Approved cancellation per 50% policy
Missing amenity	Partial refund of 10%-25% is approved
Customer did not show up	Refund denied

SLA target:

Decide refund or not within **24 hours** of the request

STAGE 3:
PAYMENT PROCESSING (24-48 hours)

Who:

Finance team or payment processor

Actions:

- [ ] Process refund to the original payment method

- [ ] Record the transaction ID and expected arrival date

- [ ] Send "Processing" email with estimated arrival date

- [ ] Send an SMS stating: "Your $[amount] refund is on the way"

SLA goal:

Payment started within **48 hours** of approval

STAGE 4:
COMPLETION AND FOLLOW-UP (5-7 days)

Who:

Automated system + Customer success

Actions:

- [ ] Send "Refund Complete" email after payment clears

- [ ] Change case to "Resolved"

- [ ] Send feedback survey within 24 hours of completion

- [ ] If a high-value customer, send a personalized apology + discount for a future purchase

SLA goal:

7 business days total cycle time

ESCALATION PROCESS

If SLA is going to be missed:

- Send notification email about the delay within 24 hours of missed SLA

- Escalate to Refund Manager

- Provide the customer with a direct contact phone number

- Add case to the daily review with the leadership team

If the customer contacts us asking for the status:

- Check if an automated email has been sent (if not, resend immediately)

- Provide the customer with a specific update with the exact next action and date

- Flag the communication system for review

- Log as a "failure to proactively communicate"

METRICS TO TRACK DAILY

Metric	Target
Average refund cycle time	<7 days
% of refunds approved vs. denied	>85% approved
% of customer service tickets asking "Where's my refund?"	<5%
% of refunds exceeding 7-day SLA	<10%

Red flags:

🚩 Any refund request older than 10 days

🚩 More than 3 customer follow-ups on the same case

🚩 "Where's my refund?" tickets above 10%

🚩 Any case where automated emails didn't send