

Overdue business invoice follow up checklist

Use this checklist for the actual service, product, site and jurisdiction. Leave missing evidence unresolved until the responsible person confirms it. Record the decision and its source before proceeding.

Business job date and responsible person

-
- ☐ Verify signed scope, change orders, completion evidence and customer acceptance.
 - ☐ Check invoice accuracy, delivery, payment terms, due date and received payments.
 - ☐ Contact the customer neutrally to confirm receipt and identify a dispute or payment problem.
 - ☐ Record each contact, promised payment date and next follow up.
 - ☐ Assess cash impact and stop extending unsupported credit.
 - ☐ Check actual jurisdiction, debt type, contract remedies and any lien requirements with qualified help.
 - ☐ Keep notice and filing deadlines tied to an authoritative source and legal review.
 - ☐ If using a provider, verify current terms and eligible member access without assuming recovery.

Unresolved items evidence and next action

Decision owner and follow up date

Sources and record notes

Author NPMCA. Worksheet version 1.0; guide record as of 2026-10-11. Technical limits and prices must come from the exact current product instructions, official rule or dated written quote.

FTC debt collection FAQs: <https://consumer.ftc.gov/articles/debt-collection-faqs>

California CSLB mechanics lien explanation:

https://www.cslb.ca.gov/Consumers/Legal_Issues_For_Consumers/Mechanics_Lien/What_Is_A_Mechanics_Lien.aspx

Guide: <https://www.npmca.org/start/when-you-need-collections>