









# Customer Success Escalation Path

Welcome to the ChartRequest Customer Success Escalation Path. If you're experiencing a ChartRequest service disruption, we're here to help. This guide will show you how to escalate issues to the appropriate ChartRequest team member.



## Don't be shy. We are here to help!

	What You Need Help With	Best Resource to Help You at ChartRequest
LEVEL 1	<ul style="list-style-type: none"> <li>I need to send paper/mail to ChartRequest.</li> <li>I have a Patient who needs help using the platform or can't go online.</li> <li>I have a Subpoena, and I'm not sure what to do with it.</li> <li>I need help adding a User to my account.</li> <li>I need to reset my Password.</li> <li>I need to submit a Refund Request for a Requestor.</li> <li>I have another issue, but I think the Support Team can quickly handle it.</li> </ul>	 <div style="display: flex; align-items: center;">  <span style="margin-left: 10px;">Level 1</span> </div> <p><b>Support Team &amp; Patient Advocates</b> EMAIL ME: <a href="mailto:support@chartrequest.com">support@chartrequest.com</a> CALL ME: <b>888-895-8366 x2004</b></p>
LEVEL 2	<ul style="list-style-type: none"> <li>I have a Request over 5 business days old.</li> <li>I received a Check from a Requestor.</li> <li>I need to submit a Request Pricing Review.</li> <li>I need help Educating my Requestors.</li> <li>I need help with a specific/challenging Requestor.</li> <li>I have another issue, but I think a Team Lead can quickly handle it.</li> </ul>	 <div style="display: flex; align-items: center;">  <span style="margin-left: 10px;">Level 2</span> </div> <p><b>Team Lead (Support and Production)</b> EMAIL ME: <a href="mailto:team-lead-support@chartrequest.com">team-lead-support@chartrequest.com</a> CALL ME: <b>888-895-8366 x2005</b></p>
LEVEL 3	<ul style="list-style-type: none"> <li>I have a Request over 10 business days old.</li> <li>We have an Audit and need Audit Support.</li> <li>An Auditor is in my office trying to scan records.</li> <li>We are moving to a new EMR.</li> <li>We grew and added a New Location.</li> <li>We need to complete a Website Integration.</li> <li>We need to schedule a Training Session for our team.</li> <li>We need to review our Pricing Schedule for Requestors and Patients.</li> <li>I have another issue, but I think a Manager can quickly handle it.</li> </ul>	 <div style="display: flex; align-items: center;">  <span style="margin-left: 10px;">Level 3</span> </div> <p><b>Production Manager</b> EMAIL ME: <a href="mailto:manager-support@chartrequest.com">manager-support@chartrequest.com</a> CALL ME: <b>888-895-8366 x2006</b></p>
LEVEL 4	<ul style="list-style-type: none"> <li>I have a Request over 20 business days old.</li> <li>We would like to recognize a ChartRequest Team Member that helped us.</li> <li>I have a Feature Request that I'd like to propose to ChartRequest.</li> <li>I have a Bug I need to report.</li> <li>We would like to schedule a Quarterly Business Review.</li> <li>I want to Refer another Client.</li> <li>I have a Special Situation related to my account, and a VP/Director is the right person to contact (Billing, Reporting, etc).</li> </ul>	 <p><b>Anthony Daly</b> <span style="float: right;">Level 4</span> VP, Client Services EMAIL ME: <a href="mailto:executive-support@chartrequest.com">executive-support@chartrequest.com</a> CALL ME: <b>888-895-8366</b> TEXT ME: <b>805-904-3592</b></p>
LEVEL 5	<ul style="list-style-type: none"> <li>I have a Request over 30 business days old.</li> <li>I am not happy with ChartRequest's Service.</li> <li>I want to fire ChartRequest.</li> <li>I want a ChartRequest t-shirt.</li> <li>I just want to talk to the CEO, because I should be able to speak with the CEO when I'm in a partnership.</li> </ul>	 <p><b>Christopher Carter</b> <span style="float: right;">Level 5</span> Chief Executive Officer EMAIL ME: <a href="mailto:ceo-support@chartrequest.com">ceo-support@chartrequest.com</a> CALL ME: <b>888-895-8366 x700</b> TEXT ME: <b>678-596-1454</b></p>