









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