
Example Escalation Process

If delays or issues arise, follow this example escalation process:

1. **Identify and document** the issue as soon as it's discovered (include date, affected filing(s), accounts impacted, and nature of the delay/error).
2. **Notify your immediate supervisor or team lead** within the same business day.
3. If the issue cannot be resolved within 24 hours, **escalate to [Designated Contact/Manager Name]** at **[email or phone number]** for review and next steps.
4. For critical issues that may impact deadlines (e.g., system outages, missing data, or client nonresponse), **contact [Support Contact or Team Lead] immediately** at **[email or phone number]**.
5. Record any escalations in the team's shared tracking sheet for transparency and follow-up.

If you have any questions about this process, please contact **[name]** at **[phone or email]**.