

## Management Escalation Task Policies and Process

### WHAT'S HAPPENING:

While ticket escalation has been in place for a while, we have now standardized and formalized our escalation process, enabling our enterprise and clinical IT support teams to create and assign **management escalation tasks** within active Incidents and Requests. These tasks will be assigned to the assignment group manager responsible for that queue, in the event that customers have requested their ticket be escalated to management.

For all ticket escalation requests, IT support teams should review the ticket status, priority and service level agreement (SLA) to determine if an escalation task should be created and assigned. If one or more of the following criteria is met, it is appropriate to use the Escalate to Manager button.

### ESCALATE TO MANAGER CRITERIA:

- Customer is stating the issue impacts patient care
- Customer is requesting status and the SLA has breached
- Customer has contacted IT more than once and has not heard from anyone
- Customer is requesting status and ticket is unassigned to an individual
- Customer is extremely dissatisfied and would like management contact
- Customer is requesting service beyond SLA commitment level

### MANAGEMENT ESCALATIONS POLICIES:

In the event you are assigned a management escalation task, the following policies must be adhered to:

- ✓ Respond to the customer within one business day. Response is defined as contacting the customer to provide an update. This contact can be made by the manager or manager delegate.
- ✓ Document all work done in the Work Notes field of the escalation task and resolve the task.

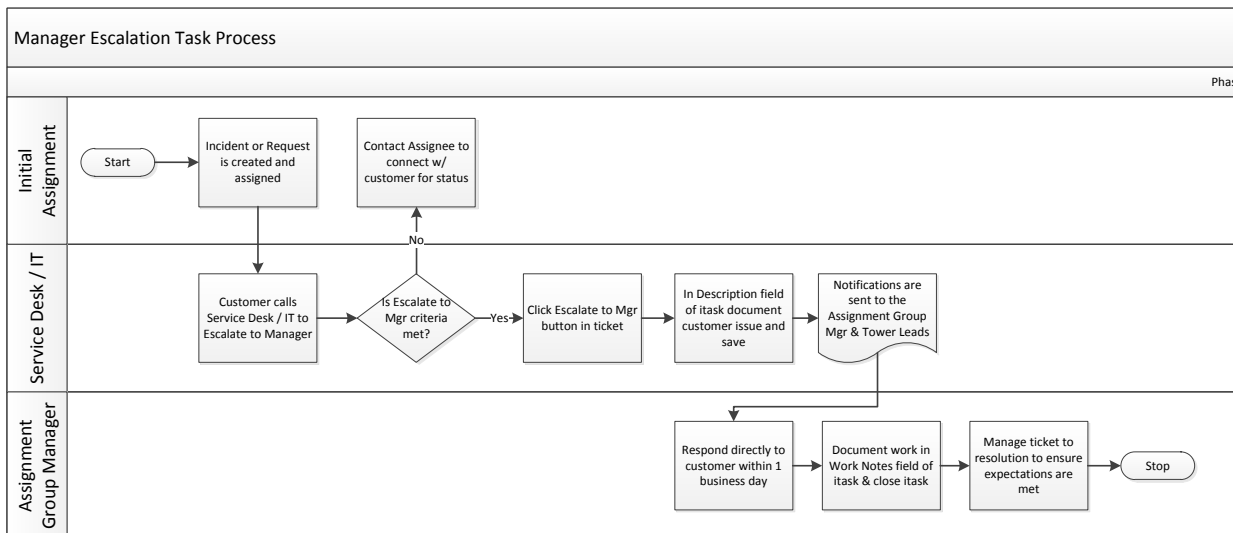
### WHY:

As part of the ITSM team's ongoing process improvement efforts, and because of operational workflow changes due to sourcing, new incident task functionality is required. By formalizing this process, we are bringing structure and focused management attention to customer situations that may otherwise result in a high level of customer dissatisfaction. Escalation is to be used to highlight or flag certain issues so that the appropriate personnel can respond to these situations and expedite resolution.

### IMPACT:

- All enterprise and clinical IT support teams will see a new button within all active incidents or Request Items labeled **Escalate to Manager**. They may use this button for customer requests to escalate an aging or difficult ticket to the assignment group manager. Clicking this button will create an **Incident Task (ITASK)** or **Catalog Task (TASK)** within the ticket in question and assign the task to the manager of that ticket's assignment group. Notification of the task assignment will also go out to that manager, configured delegates and supervisors and Tower Leads for HCL assignment groups.
- Incident or Catalog Tasks must be resolved before the parent ticket can be resolved. Timely response to these tasks is required to sustain customer support efforts and maintain Service Level Agreements.

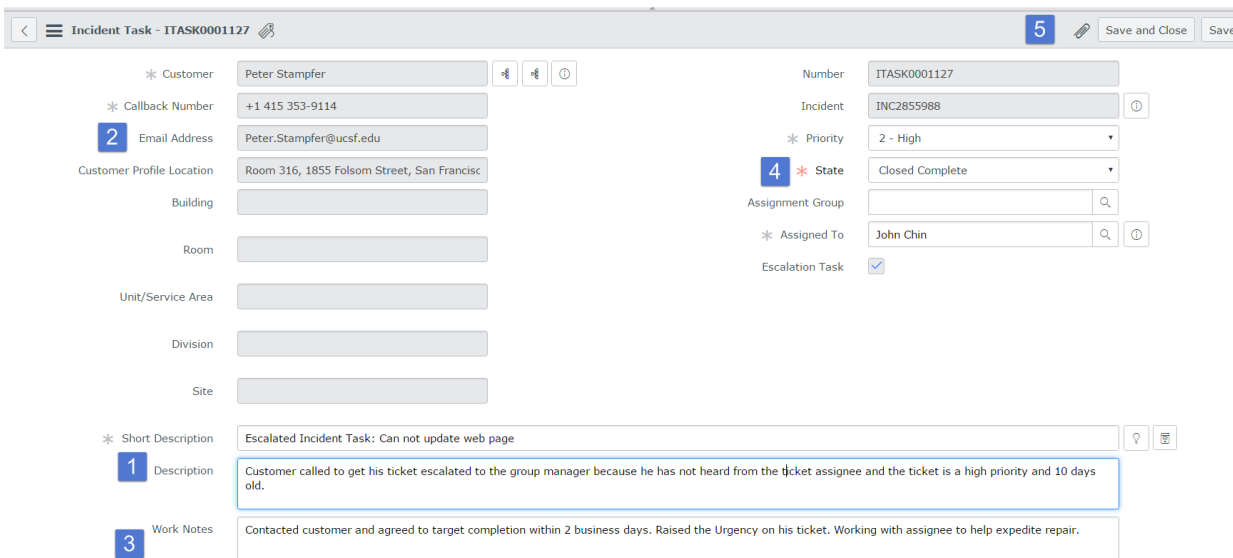
## WORKFLOW:



## WHAT YOU SHOULD DO:

If you are an assignment group manager, supervisor or Tower Lead, be vigilant and aware that you may be assigned an Escalate to Manager task. Email notifications are sent to you at the time of task assignment. SMS notifications are also available. Look for the subject line **Manager Escalation:** followed by the task number and short description of the incident or request. Once you receive a task, it becomes your responsibility to define the actions needed to resolve the escalation.

## HOW TO ACKNOWLEDGE AND CLOSE A MANAGER ESCALATION TASK



- 1) Review the description of the task to learn why the customer is asking for an escalation. It is also helpful to review the incident history as well. Talk with the assignee and develop a plan for resolving the ticket.
- 2) Contact the customer, either by phone call or email. Update the customer with your plan for resolving the ticket. Be sure to get customer agreement on the plan.
- 3) Document in the Work Notes all details of what was done and what is expected going forward.
- 4) Set the task State to Closed Complete.
- 5) Click Save and Close.

It is a good practice to keep track of the progress of all tickets that were escalated to you. If the agree upon plan falls behind schedule, best practice is to follow up with the customer again and inform him or her of the delay. Communication is key to the successful completion of aging or difficult tickets.

**ADDITIONAL INFORMATION:**

Escalation Tasks are found within the Incident in the Incident Tasks tab or within the Request Item in the Catalog Tasks tab of the Related Links section at the bottom of the each form.

**Related Links**

[Create or Join Chat Room](#)

Incidents | Approvers | Survey Responses | SLAs (2) | Affected CIs (1) | Requested Items | Change Requests | Apex Change Requests | Bomgar Sessions | CIs by Customer (2) | Enhancements | Incident Tasks (1)

Incident Tasks **New** Go to Number Search

Parent = INC2837423

Number	Priority	State	Short Description	Assignment Group	Assigned To
<input type="checkbox"/> ITASK0001025	4 - Low	Open	Escalated Incident Task: Test		Peter Stampfer

Actions on selected rows...

**Related Links**

[Show Workflow](#)

[Workflow Context](#)

Catalog Tasks (1) | Approvers | Change Requests | Task SLAs | Enhancement or Defects

Catalog Tasks **New** Go to Number Search

Request item = RITM0077474

Number	State	Assignment Group	Assigned To	Task Description	Created	Updated
<input type="checkbox"/> TASK0125438	Open		Peter Stampfer	Escalated Catalog Task: RITM0077474 - ServiceNow / ApexNow Enhancement Requests	2016-12-14 15:40:26	2017-02-24 15:57:41

Actions on selected rows...

If you have any questions, please email or call Peter Stampfer at (415) 353-9114. Incident Management process documents, quick reference guides and other information can be found on the ITSM website at <http://itsm.ucsf.edu>.