

Step 1: Days until closing?

- 7+ days: Standard email request
- 3-6 days: Email + rush flag. Call if no response in 24h
- 1-2 days: Call immediately. Email as backup
- Same day: Call. Escalate if no answer

Step 2: Did they respond?

- YES -> Note commitment. Get it in writing.
- NO -> Move to Step 3

Step 3: Time sensitivity check?

- 5+ days out: Follow-up email. Call if no response in 24h
- Under 5 days: Call documents department directly

Step 4: Phone result?

- ANSWERED -> Got commitment? Send confirmation email.
- VOICEMAIL -> No callback in 2 hours? ESCALATE.

ESCALATE TO:

- HOA board president (find in governing docs)
- Management company regional supervisor
- Professional retrieval service (HOA Docs Direct)

Tip: Always follow up a phone call with a confirmation email for the paper trail.

Phone scripts and email templates available at hoadocsdirect.com/blogs/blog-rush-order-decision-tree.html