TROUBLESHOOTING ESSENTIALS · COURSE TOOLKIT

Escalation Handover Template

> **Toolkit 7 of 10** · Escalation Handover Template · Based on §13.1–13.4 and Fig 13.1 of Dr. Tahseen Al Doori's *Troubleshooting Essentials*, University Edition (2026). The six handover parts, the escalation triggers and the support tiers are the author's; the form layout is the course's.

How to use this sheet

Knowing when to stop is itself a troubleshooting skill. Use Part 1 to decide whether to escalate and to whom. Then complete Part 2, the handover, so that the next person can **continue from where you stopped instead of starting again**. Attach your problem log. Never include passwords or other credentials in a handover.

Part 1 — The escalation decision

Escalation triggers

Tick every trigger that applies. Any one is enough to stop and escalate.

✓	TRIGGER	DETAIL FOR THIS PROBLEM
☐	**Safety is at risk:** burning smells, smoke, sparks, swollen batteries, exposed wiring, water near electricity (switch off at the source only if it is safe to do so)	
☐	**Data may be lost:** failing disks, ransomware, accidental deletion (stop using the device)	
☐	**Security is involved:** suspected intrusion, phishing, unknown logins, stolen devices	
☐	**The fix is beyond your authority or access:** servers, network equipment, other users' accounts	
☐	**The equipment is under warranty or contract**	
☐	**All theories are exhausted, or an agreed time limit has passed**	
☐	**Many users or critical business services are affected**	

The tiered support model

Fig 13.1 of the book. Escalate down the tiers when a fault exceeds skill, access, authority or time.

TIER	ROLE	TYPICAL WORK	ESCALATE TO (NAME / TEAM / CONTACT)
Tier 0	Self-help	Knowledge base, FAQs, checklists	
Tier 1	Help desk	Password resets, quick-win checks, logging tickets	
Tier 2	Technical support	Deeper diagnosis, remote access, configuration	
Tier 3	Specialists	Engineers, developers, network and server experts	
Tier 4	Vendor / external	Manufacturer, software vendor, internet service provider	

Escalating from tier ____ to tier ____ because:

_____

Part 2 — The handover

Complete all six parts, in this order.

PART	CONTENT	ENTRY
1. Problem statement	Use the template: Since [when], [who] cannot [what] on [where]. It happens [always / intermittently] when [how]. The most recent change was [which]. The error shown is "[exact message]".	
2. Exact error messages, screenshots and photographs	Word for word, with codes; list attachments	
3. When the problem started and what changed beforehand	Date and time; every change found	
4. Every action taken and the result of each	In order; include tests that ruled things out	
5. The urgency and the number of users affected	Business impact; deadlines; how many users or services	
6. Contact details and availability	Of the user and of the person escalating	

Action record for Part 4

#	DATE AND TIME	ACTION OR TEST	RESULT
1			
2			
3			
4			
5			
6			

Contacts for Part 6

ROLE	NAME	CONTACT METHOD (PHONE, EMAIL, TICKET)	AVAILABILITY
User			
Person escalating			

Part 3 — Keeping the user informed

✓	BEFORE YOU FINISH
☐	I have told the user, in plain language and without blame, that the problem has been passed on, to whom and why
☐	I have given a realistic expectation of time and the next step
☐	I have agreed how and when the user will hear about progress
☐	The ticket records the escalation and the handover is attached

Quality check: could a stranger continue this work using only this handover and the problem log? If not, add what is missing.

Sources

- Dr. Tahseen Al Doori — *Troubleshooting Essentials*, University Edition (2026), §4.6, §10.4 (security reminder), §13.1–13.5, Fig 13.1