

Service Callback Handoff

1 INTAKE

CALLBACK IDENTITY

Copy customer wording; link the original job

Callback ID

Received date / time

Received by

Customer / contact

Service address

Contact method

ORIGINAL VISIT

Original job / invoice reference

Original visit date

Original technician / crew

First noticed

Original work summary

Customer-reported issue - use their words

Changed since first report?

Immediate risk disclosed?

Safety / stop-use instruction recorded (follow your own policy)

Intake status

Owner reviewing intake

Service Callback Handoff

2 DISPATCH

EVIDENCE AND ACCESS

Record references, not passwords or private credentials

Photos / video / message reference

Error code or customer wording

On-site contact / callback number

Available access window

Entry / pet / occupant notes

Parking / gate / building notes

Known site conditions and utilities available

VISIT PLAN

Model / serial / item reference

Likely parts / tools to bring

Assigned technician / crew

Appointment date / window

Customer expectation for this return visit

Dispatch decision owner

Dispatch status

READY means the technician can identify the job, reach the site, and understand the visit goal.

- If evidence or access is missing: request it before dispatch.
- If the issue may be unsafe: follow your company escalation process.
- Do not promise warranty coverage or no-charge work before an authorized decision.

Service Callback Handoff

ARRIVAL AND FINDINGS

Separate observation from conclusion

Arrival / departure

Technician / crew

Issue reproduced?

Parts used

Observed condition

Work performed / tests completed

Resolution type

Cause note / classification

SCOPE AND NEXT STEP

Outside original scope?

Authorization / change reference

Follow-up needed?

Next action owner

Next action due

Return-visit status

Service Callback Handoff

4 CLOSE

VERIFICATION AND CUSTOMER HANDOFF

Verified by

Verification method

Customer informed - when / how

Customer response

OWNER DECISION AND RECORD

Warranty / billing decision owner

Decision date

Recorded billing / warranty decision

Linked invoice / change / job record

Files stored / evidence reference

Close date

Final close status

Process update / prevention note

Internal notes

LIMITS

Operational handoff only - not a diagnosis, warranty determination, contract, or safety assessment.

Keep the original job record, customer communications, photos, approvals, and company policy as the record of truth.

Do not enter passwords, door codes, payment data, or regulated personal information.