



Financial Services Help Desk Escalation Checklist

Initial Ticket Assessment

Verify ticket details, severity, and impact. Confirm initial troubleshooting steps have been attempted.

Ticket ID

Severity Level

- ☐ Critical
- ☐ High
- ☐ Medium
- ☐ Low

Impact Area

- ☐ System Access
- ☐ Application Performance
- ☐ Data Integrity
- ☐ Network Connectivity
- ☐ Other

User Description of Issue