

Garage Door Diagnostic and Safety Handoff

Keep equipment identity, component observations, authorization, repairs, retests, and unresolved conditions together.

Safety-related findings and declined work can become unclear after a fast residential service handoff.

01 INTAKE

CAPTURE ONCE. HAND OFF CLEANLY.

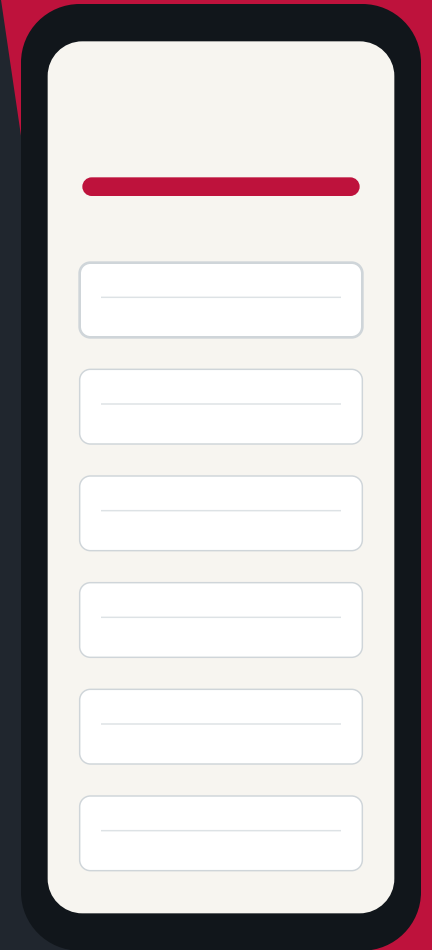
02 IDENTIFY

CAPTURE ONCE. HAND OFF CLEANLY.

03 OBSERVE

CAPTURE ONCE. HAND OFF CLEANLY.

GALLERY EDITION - FREE PUBLIC NOTE



Customer, Complaint, and Equipment Profile

INTAKE

IDENTIFY

OBSERVE

TEST

REPAIR

HANDOFF

WHAT CONDITION REQUIRES STOP-USE ADVICE?

WHAT AREA WAS NOT ASSESSED?

WHAT TEST WAS LIMITED?

WHAT WORK WAS DECLINED?

WHAT CONDITION REMAINS UNRESOLVED?

WHAT FOLLOW-UP IS TIME SENSITIVE?

ID	RISK / EXCEPTION	TREATMENT	OWNER	DUE	STATUS

Baseline Condition and Photo Map

INTAKE

IDENTIFY

OBSERVE

TEST

REPAIR

HANDOFF

PHOTO / EVIDENCE 1

REF / LOCATION

OBSERVATION

PHOTO / EVIDENCE 2

REF / LOCATION

OBSERVATION

PHOTO / EVIDENCE 3

REF / LOCATION

OBSERVATION

ID	FINDING / CHANGE	IMPACT	OWNER	DUE	STATUS

EVIDENCE SUMMARY / HANDOFF TREATMENT

Door Hardware and Counterbalance Observations

INTAKE

IDENTIFY

OBSERVE

TEST

REPAIR

HANDOFF

AREA / ASSET / WORK UNIT

LOCATION / REFERENCE

PHOTO / SOURCE IDS

COMPONENT	LOCATION	OBSERVED CONDITION	TEST/ACTION	PRIORITY	PHOTO REF

SKETCH / SEQUENCE / WORKING NOTES

UNKNOWNNS / DECISION NEEDED

Operator, Controls, and Safety Systems

INTAKE

IDENTIFY

OBSERVE

TEST

REPAIR

HANDOFF

Operator, Controls, and Safety Systems

Mark only what was actually observed; use notes for limits and exceptions

☐ Site access and clearance noted

☐ Travel and limits recorded

☐ Manufacturer test reference captured

☐ Before/after photos linked

☐ Existing damage recorded

☐ Warning labels noted

☐ Declined work stated

☐ Customer demonstration recorded

☐ Operator mounting observed

☐ Manual release observed

☐ Parts and adjustments listed

☐ Follow-up and warranty ref listed

OBSERVED EXCEPTION / LIMITATION

REQUIRED ACTION / OWNER / DUE

ID	FINDING	EVIDENCE	OWNER	DUE	STATUS

Repairs, Parts, and Authorization

INTAKE

IDENTIFY

OBSERVE

TEST

REPAIR

HANDOFF

AUTHORIZED SCOPE / APPROVED CHANGE

WORK PERFORMED / CURRENT STATUS

PART/WORK	PART NO.	QTY	AUTHORIZATION	STATUS

LABOR / TIME / SEQUENCE

EVIDENCE REFERENCES

UNFINISHED / RETURN WORK

Post-Service Functional Check

INTAKE

IDENTIFY

OBSERVE

TEST

REPAIR

HANDOFF

Post-Service Functional Check

Mark only what was actually observed; use notes for limits and exceptions

- ☐ Site access and clearance noted
- ☐ Existing damage recorded
- ☐ Operator mounting observed
- ☐ Travel and limits recorded
- ☐ Warning labels noted
- ☐ Manual release observed
- ☐ Manufacturer test reference captured
- ☐ Declined work stated
- ☐ Parts and adjustments listed
- ☐ Before/after photos linked
- ☐ Customer demonstration recorded
- ☐ Follow-up and warranty ref listed

OBSERVED EXCEPTION / LIMITATION

REQUIRED ACTION / OWNER / DUE

ID	FINDING	EVIDENCE	OWNER	DUE	STATUS

Customer Handoff and Follow-Up

INTAKE

IDENTIFY

OBSERVE

TEST

REPAIR

HANDOFF

Handoff gate
Close the record only when every exception has an owner and next step

- ☐ Equipment identity is complete
- ☐ Test reference and result are recorded
- ☐ Declined work is visible
- ☐ Customer demonstration is recorded
- ☐ Baseline condition is photo linked
- ☐ Repairs and parts are itemized
- ☐ Unresolved conditions are stated
- ☐ Receipt and follow-up are assigned

CLIENT-READY OUTCOME SUMMARY

OPEN WORK / LIMITATION / QUOTE ITEM

PRIORITY	NEXT ACTION	EVIDENCE / SOURCE	OWNER	DUE	STATUS