Triage Guide — Onboarding

SAMPLE DOCUMENT — FOR TRAINING PURPOSES ONLY

Triage Reference Guide — Onboarding

Urgency Criteria

Urgency is driven by queue age and downstream impact. Long-waiting items block other processes. Look for clusters of related requests.

Priority Scale (Days_In_Queue)

- **1-3 days:** URGENT — act today
- **4-7 days:** ATTENTION — schedule this week
- **8-14 days:** ROUTINE — plan for next week
- **15+ days:** LOW — monitor only

Categories

- **New SMB**
- **E-Commerce**
- **High Risk**
- **Referral**
- **Migration**

Status Values

- **Submitted**
- **Under-Review**
- **Blocked**
- **Approved**

Escalation Rules

1. Any item categorised as URGENT that has been in queue for more than 24 hours
2. Multiple items from the same source or merchant (pattern indicates systemic issue)
3. Items with contradictory data (status says one thing, priority says another)
4. Items you cannot categorise with the information available

The 5 Failure Modes (check your output)

1. **Miscalculation** — Are the counts in your summary correct? Count manually.
2. **Misclassification** — Did the AI put ambiguous items in the right category?
3. **Hallucinated references** — Do any links, IDs, or cross-references actually exist?
4. **Overconfident language** — Does the output say "definitely" when it means "likely"?
5. **Missing context** — What do you know from experience that the data doesn't show?