

THE NECESSARY EVIL

AI for Help Desk and IT Support

Companion Packet

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PUBLIC EDITION

10 Companion Resources

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Core Companion Packet

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Human-Governed AI Support Boundary Card

A one-page reminder of what AI may assist with and what remains human-owned.

AUTHORITY Non-authoritative. Local policy, approved procedure, authorized knowledge, and accountable human authority govern.

AI may assist with

- Organizing ticket facts and questions
- Drafting clear user-facing wording
- Summarizing verified information
- Comparing approved sources
- Identifying missing information or assumptions
- Preparing a handoff or escalation summary
- Reviewing a draft for clarity, unsupported certainty, privacy, and missing evidence

AI does not own

- Deciding what is true
- Authorizing an action
- Deciding identity, access, account recovery, password/MFA reset, privileged access, or exceptions
- Investigating or directing security operations
- Choosing local priority/severity/queue/closure rules
- Closing or reopening tickets
- Approving knowledge for publication
- Performing Tier 3/System Administration or production changes
- Taking accountability from the technician or authorized owner

Technician pause points

- ☐ What part is verified fact, and what part is an assumption or suggestion?
- ☐ Is the source approved and current for this environment?
- ☐ Am I authorized to take or communicate this action?
- ☐ Does the content expose data that is unnecessary or prohibited?
- ☐ Does this case cross into identity/access, security, privileged work, infrastructure, or another accountable-owner boundary?
- ☐ Should I revise, reject, or escalate instead?

STOP / ESCALATE When authority is unclear, evidence is insufficient, or the case crosses a receiving-team boundary, stop at preparation and handoff. Follow the organization's approved route.

Technician Verification Checklist

Use before relying on AI-assisted ticket content, troubleshooting preparation, communication, or handoff.

AUTHORITY Use only within approved local policy, procedure, knowledge, and human authority.

Verify the record

- ☐ I separated the user's statement from technician-observed facts.
- ☐ I identified assumptions, hypotheses, and unknowns explicitly.
- ☐ I confirmed names, dates/times, device/application context, symptoms, and results only from authorized records or direct observation.
- ☐ I removed AI-invented details or wording that implies facts not established.

Verify the source

- ☐ Any troubleshooting suggestion is traceable to an approved procedure, official documentation, or authorized knowledge.
- ☐ The source is current enough for the claim being made.
- ☐ Draft or AI-generated knowledge is not being treated as approved knowledge.
- ☐ If sources conflict or authority is unclear, I stopped and used the approved escalation/knowledge-owner path.

Verify privacy and authority

- ☐ Only necessary information is included.
- ☐ No credentials, secrets, unnecessary personal/sensitive data, or restricted material is included.
- ☐ The AI system/use is permitted for this information and purpose under local rules.
- ☐ I am authorized to perform or communicate the proposed next step.
- ☐ The work has not crossed into identity/access, security operations, privileged work, infrastructure remediation, production change, or another receiving-team boundary.

Verify the communication

- ☐ The wording distinguishes verified facts from possibility or uncertainty.
- ☐ It does not create an unauthorized promise, deadline, commitment, or decision.
- ☐ It does not claim resolution before resolution is verified under local process.
- ☐ The final content is understandable to its intended reader.

Final human disposition

- ☐ Use as written

- ☐ Revise before use
- ☐ Reject AI output
- ☐ Escalate / request accountable-owner review

Ticket Intake / Clarification Checklist

Use before asking AI to suggest troubleshooting paths or draft a response.

LOCAL POLICY Required ticket fields, categories, priorities, queues, and escalation rules are local.

Capture what is actually known

- ☐ User's stated goal or requested outcome
- ☐ Observable problem or symptom
- ☐ Scope: one user/device/application or broader, if known
- ☐ When the issue began or was first noticed, if known
- ☐ Business/user impact in the user's own terms where appropriate
- ☐ What changed beforehand, if verified and relevant
- ☐ What has already been attempted
- ☐ Result of each attempted action
- ☐ Current state now

Separate evidence from interpretation

User statement: what the user reported

Technician observation: what you directly observed or verified

Known record fact: what an authorized source establishes

Assumption / hypothesis: plausible but not established

Unknown / missing information: not yet known

Ask neutral clarification questions

"What do you see on screen when you try?"

"Does this happen every time or intermittently?"

"What was the result of the last approved troubleshooting step?"

"Is the problem limited to this device/application, or is that still unknown?"

CAUTION Do not phrase a guess as if the cause is already known.

Privacy / boundary check

- ☐ I am collecting only information needed for the support purpose.
- ☐ I am not requesting credentials, secrets, or unnecessary sensitive data.
- ☐ I have not turned intake into identity-proofing, account-recovery, security investigation, privileged troubleshooting, or Tier 3/System Administration procedure.
- ☐ If the case crosses an authority boundary, I will prepare an approved handoff rather than continue beyond scope.

Organization-approved local fields, if applicable:

Truthful Ticket Notes Template

A structure for factual, auditable notes that preserve uncertainty.

LOCAL POLICY Use local required fields and state labels. Do not invent or override them.

User statement - what the user reported, in neutral language:

Technician observation / verified facts:

Approved action attempted:

Result - what happened after the action:

Assumptions / hypotheses:

Unknowns / missing evidence:

Current support state:

Next approved step / handoff needed:

Synthetic example

User statement: "The application closes when I select Print."

Technician observation: Application opened normally; issue reproduced once using a synthetic test document.

Attempted action: Followed approved local application troubleshooting article step 2.

Result: Print dialog opened afterward; repeated verification has not yet been completed.

Unknown: Whether the issue is fully resolved.

Current state: Improvement observed; resolution not yet claimed.

Guardrails

- Do not write an AI hypothesis as a confirmed cause.
- Do not claim a fix, resolution, closure, user confirmation, or approval that did not occur.
- Do not include credentials, secrets, unnecessary sensitive data, or restricted information.
- Stop before privileged, infrastructure, security-operations, identity/access, or Tier 3 procedures.

Knowledge / Source Traceability Worksheet

Use when AI helps summarize, compare, or prepare troubleshooting guidance.

LOCAL POLICY Approved knowledge hierarchy, ownership, publication, versioning, and retirement rules are local.

Claim / suggestion under review:

Source record

Source title / identifier:

Source owner / publisher:

Source type:

Version/date, if material:

Location/citation:

Accessed/reviewed date:

Authority and freshness check

- ☐ This source is authorized for the intended support use.
- ☐ The source is current enough for this claim.
- ☐ The cited section actually supports the proposed statement/action.
- ☐ A draft KB article, AI output, forum post, or unofficial source is not being represented as approved procedure.
- ☐ Any conflict between sources has been routed to the approved knowledge/technical owner rather than resolved by AI.

Traceability decision

- ☐ Supported as written
- ☐ Not supported

☐ Partially supported

Needed correction / qualification:

Human reviewer / owner, if required:

PUBLICATION BOUNDARY AI may draft or summarize knowledge, but it does not approve knowledge for organizational publication.

Sensitive-Data Minimization / Redaction Checklist

Use before placing support context into an AI system or AI-assisted workflow.

AUTHORITY Applicable law, contract, classification, retention, organizational policy, approved AI systems, and local privacy/security procedure govern.

Purpose check

- ☐ I can state the support purpose for using this information.
- ☐ Each included detail is necessary for that purpose.
- ☐ I am using an AI system and workflow approved for this data and purpose.

Remove or avoid unless explicitly required and authorized

- ☐ I removed or avoided passwords, MFA codes, recovery codes, secrets, tokens, API keys, and private keys.
- ☐ I removed or avoided full authentication material and security answers.
- ☐ I removed or avoided unnecessary personal identifiers and contact details.
- ☐ I removed or avoided financial, health, regulated, or other sensitive data not needed for the support purpose.
- ☐ I removed or avoided restricted, classified, or employer-sensitive information unless explicitly required and authorized.
- ☐ I removed or avoided internal hostnames, IP addresses, architecture details, logs, screenshots, or security findings when not necessary and authorized.
- ☐ I used synthetic or minimized data instead of real ticket/customer data when the real data was not necessary.

Minimize the remaining context

- ☐ Replace real names with neutral labels where identity is not needed.
- ☐ Generalize device/application context where exact identifiers are not needed.
- ☐ Quote only the portion of a message/log necessary to understand the issue.
- ☐ Remove unrelated history and attachments.
- ☐ Preserve enough context to avoid misleading the reviewer or model.

Synthetic redaction example

Before: "Jane Smith at jane.smith@example.invalid cannot open PayrollApp on workstation ABQ-WS-0042;

her screenshot includes an employee ID and access token."

After: "A user cannot open the approved business application on their assigned workstation. The screenshot contains unrelated identifiers and authentication material; those details are excluded."

STOP CONDITION If you are unsure whether information may be processed, retained, disclosed, or entered into the approved AI system, stop and use the organization's privacy/security/policy route.

Escalation / Handoff Note Template

Hand work to the accountable owner without pretending to control the receiving team's procedure.

LOCAL POLICY Queue names, routing, urgency/severity, mandatory fields, clocks, and acceptance rules are local.

Issue / request:

User/business impact:

Verified facts:

User-reported information:

Approved Help Desk actions attempted:

Results / evidence:

What was intentionally not attempted:

Current workaround, if any and approved:

Assumptions / hypotheses not yet verified:

Unknowns / missing evidence:

Reason for escalation / ownership boundary:

Specific help or decision requested from receiving owner:

Local routing fields, if applicable:

BOUNDARY The Help Desk handoff should communicate evidence and the requested next-owner action. It must not invent receiving-team diagnostics, privileged actions, security response, IAM decisions, infrastructure changes, production changes, or Tier 3 remediation.

Resolution-State Evidence Checklist

Use before describing a ticket as improved, resolved, ready for closure, or closed.

LOCAL POLICY Local state names, closure reasons, permissions, confirmation rules, auto-close behavior, audit rules, and reopening authority govern.

Evidence distinctions

- **Attempted action:** an approved action was performed; outcome may still be unknown.
- **Observed improvement:** some symptom or behavior improved; full resolution is not yet established.
- **Workaround:** an alternate path is available; the underlying issue may remain.
- **Verified resolution:** available evidence meets the organization's approved resolution criteria.
- **Closure:** an authorized local workflow/state change performed by an authorized person or system.
- **Reopen / recurrence:** the issue returned or local process requires renewed work; use local authority and rules.

Before claiming resolution

- ☐ I can identify what evidence demonstrates the claimed outcome.
- ☐ I did not turn "no recent reply" into proof of technical resolution.
- ☐ I did not turn a workaround into a permanent fix.
- ☐ I did not treat one successful attempt as proof of full resolution when repeat verification is required locally.
- ☐ User confirmation is recorded only if it actually occurred and is required/relevant under local process.
- ☐ Any unresolved uncertainty is visible in the notes.

Before a closure-related statement or action

- ☐ The local process permits the proposed state/closure action.
- ☐ The person/system taking the action has authority to do so.
- ☐ Required evidence/communication is present under local rules.
- ☐ AI is not selecting closure reasons, closing the ticket, suppressing escalation, or deciding that unresolved risk can be ignored.

Shift Handoff / Continuity Template

Preserve continuity without hiding uncertainty or exposing unnecessary sensitive data.

LOCAL POLICY Local ownership, timing, ticket fields, and handoff rules govern.

What the user/requestor needs:

Current observable issue/state:

Verified facts:

Work completed this shift:

Results:

Approved workaround currently in use, if any:

What remains unknown / uncertain:

Pending external/user/owner input:

Next approved Help Desk action, if already established:

Ownership / escalation status:

Local continuity fields, if applicable:

Handoff quality check

☐ The next technician can distinguish facts from assumptions.

☐ Actions and results are paired; no attempted step is recorded as successful without evidence.

- ☐ The handoff does not erase unresolved uncertainty.
- ☐ Only necessary information is included.
- ☐ No credentials, secrets, unnecessary sensitive data, or restricted information is carried forward.
- ☐ Receiving-team/Tier 3/security/IAM procedures are not invented.

Pre-Send / Pre-Action AI Output Review Checklist

Use before a user sees AI-assisted wording or before an AI-assisted suggestion influences support action.

AUTHORITY Organizational policy, approved local procedure, authorized knowledge, and accountable human authority govern.

Facts and uncertainty

- ☐ Every material factual statement is verified against an authorized record/source.
- ☐ User statements, technician observations, assumptions, and unknowns are not blended together.
- ☐ Unsupported certainty, invented causes, fabricated steps, or implied verification have been removed.
- ☐ Current/version-sensitive claims use an appropriate current authoritative source.

Source and procedure

- ☐ Troubleshooting content is traceable to approved procedure, official documentation, or authorized knowledge.
- ☐ AI-generated or draft knowledge is not presented as approved procedure.
- ☐ Conflicting/unclear guidance is routed to the accountable knowledge/technical owner.

Privacy and data minimization

- ☐ Only necessary context is present.
- ☐ Credentials, secrets, prohibited sensitive material, unnecessary identifiers, and restricted information are excluded.
- ☐ The approved AI system/use is permitted for this information and purpose.

Authority and scope

- ☐ The proposed communication/action is within my authorized Help Desk scope.
- ☐ AI has not made an identity/access/account-recovery/MFA/password/privileged-access decision.
- ☐ AI has not directed a security investigation/response, infrastructure remediation, production change, or Tier 3/System Administration action.
- ☐ Local ticket state, queue, priority, severity, closure, escalation-clock, or access-authority rules have not been invented.
- ☐ If ownership has moved elsewhere, the output stops at preparation/handoff.

Communication quality

- ☐ The message is clear and appropriate for the intended reader.
- ☐ It does not create unauthorized promises, commitments, deadlines, approvals, or guarantees.

- ☐ It does not claim resolution or closure without the required evidence and authority.
- ☐ Any uncertainty that matters to the recipient is visible.

Human disposition

- ☐ Approve for this specific use
- ☐ Revise and re-check
- ☐ Reject
- ☐ Escalate / request accountable-owner review