The chart checklist

Fill in what you know before day one, and your first day is shorter. Write where access lives and who holds it. Anything you can't find, we go after with your outgoing IT provider.

Never write a password on this sheet. Passwords move into 1Password on site, never onto paper.

Hospital or clinic name _____ Locations _____

Practice manager _____ Medical director _____

Computers, servers and tablets, roughly _____ Day one date _____

Logins and admin access 01

- [ ] Google Workspace or Microsoft 365 admin: who holds it
- [ ] Domain name and DNS: registrar, and who holds the login
- [ ] Outgoing IT provider: name and contact
- [ ] Shared logins still in use (account names only)

Network 02

- [ ] Internet provider and account holder; backup path, if any
- [ ] Router or firewall: model, and who holds the admin login
- [ ] Wi-Fi and switches: model, and who holds the admin login
- [ ] Where the network closet or rack is

Servers and devices 03

- [ ] Server: where it sits, roughly how old, battery backup or not
- [ ] Where server and device admin access lives
- [ ] Apple Business Manager: who owns the account
- [ ] Tablets: how many iPads, how many older tablets

Practice-management system 04

- [ ] Name and version
- [ ] Cloud or on site; vendor support contact
- [ ] Old server still used to look up records?

Imaging 05

- [ ] X-ray or CT vendor and support contact
- [ ] Static IP and network documentation on file?

Printers 06

- [ ] Label printer models, and network or USB
- [ ] Printers kept for controlled-substance logs and final documents

Phones 07

- [ ] Phone system and provider
- [ ] Number of handsets; who holds the admin login

Backups 08

- [ ] What is backed up, and where
- [ ] The last time anyone restored from it