

Is Your Practice's IT Actually Healthy?

The 20-Point IT & Security Self-Check for Dental and Medical Offices

Answer honestly — nobody sees this but you. Every “no” or “not sure” is a gap that costs practices real money and real patient trust when it finally surfaces. It takes about ten minutes.

A. Patient Data & Backups

- ☐ YES ☐ NO Do you know exactly where patient data lives — practice management, imaging, email, spreadsheets?
- ☐ YES ☐ NO Are backups running nightly — verified by a person or report, not assumed?
- ☐ YES ☐ NO Is at least one backup copy stored away from the office (not on the same server or shelf)?
- ☐ YES ☐ NO Has anyone actually test-restored a file from backup in the last 6 months?
- ☐ YES ☐ NO Is your imaging server backed up separately from your practice management system?

B. Security Basics

- ☐ YES ☐ NO Is multi-factor authentication turned on for email and remote access?
- ☐ YES ☐ NO Does every staff member have their own login — no shared front-desk passwords?
- ☐ YES ☐ NO Are Windows and software updates current on every machine, including operatory PCs?
- ☐ YES ☐ NO Has your firewall configuration been reviewed in the last year?
- ☐ YES ☐ NO Would your front desk recognize a fake invoice or a “changed bank details” email?

C. Access & Accountability

- ☐ YES ☐ NO Is access to patient records limited by role, not open to everyone?
- ☐ YES ☐ NO Could you tell who accessed what if you ever had to answer that question?
- ☐ YES ☐ NO Do you have signed BAAs with every vendor that touches patient data — including IT?
- ☐ YES ☐ NO When someone leaves the practice, is there a same-day checklist that shuts off their access?
- ☐ YES ☐ NO Is guest / patient Wi-Fi fully separated from the clinical network?

D. When Things Break

- ☐ YES ☐ NO If the server died at 8 a.m., do you know what the morning would look like?
- ☐ YES ☐ NO Is there a written plan for what gets restored first?
- ☐ YES ☐ NO Does everyone know who to call — one number, not “whoever set that up”?
- ☐ YES ☐ NO Could the office limp along on paper for a day without chaos?
- ☐ YES ☐ NO If your internet went down, does the office have any backup connection?

Count your “NO” and “not sure” answers

0–3 "no" answers	You are in better shape than most. Re-run this check twice a year.
4–8 "no" answers	Real gaps. Worth a professional assessment before one of them surfaces on its own.
9+ "no" answers	Your practice is running on luck. Get help now — before the bad Monday.

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