Dental IT Essentials
Checklist

Use this checklist to evaluate if your current IT setup is protecting your growth, patients, and peace of mind.

Cybersecurity & Compliance

- ☐ Antivirus software is current and centrally monitored
- ☐ Firewall is properly configured and up-to-date
- ☐ Endpoint Detection & Response (EDR) in place to protect devices
- ☐ Managed Detection & Response (MDR) in place for 24/7/365 threat monitoring
- ☐ Regular patching and system updates

Backup & Disaster Recovery

- ☐ Automated, daily, encrypted backups running reliably
- ☐ Offsite/cloud redundancy enabled
- ☐ You can restore systems and data within 1 business day if needed
- ☐ Disaster recovery plan documented and tested quarterly

IT Support

- ☐ Unlimited remote help desk support during business hours
- ☐ Emergency after-hours support available
- ☐ Onsite technician available when needed
- ☐ Clear SLAs (service level agreements) with quick response times

Vendor Coordination

- ☐ Staff never left "in the middle" of finger-pointing
- ☐ Escalations handled without extra cost or delay

Scalability & Dental-Specific Knowledge

- ☐ IT infrastructure supports possible expansion, future locations, imaging upgrades
- ☐ Your IT partner understands dental systems like Open Dental, OrthoTrac, Dexis, SIDEXIS, WinOMS
- ☐ You review your tech plan with your IT partner at least once a year

❌ **Red Zone (Below 10)**
It's time for a deeper look.

⚠️ **Yellow Zone (10-14 boxes checked)**
Time to tighten your tech.

✅ **Green Zone (15-18 boxes checked)**
You're in great shape!

Ready to review your results with a dental IT expert?
Let's walk through it together with a free IT Risk Assessment.

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