

Healthcare IT Risk Checklist

A quick and practical self-assessment for healthcare leaders who need reliable systems, responsive support, secure records, and clear technology decisions.

How to use this checklist	Mark each item Green , Yellow , or Red . Then choose the two areas where action would most reduce friction, risk, or uncertainty for your team.
Simple scoring	Green = working well. Yellow = needs attention. Red = creates risk, delay, or recurring frustration.

1. Care Continuity & Access

Question	Green	Yellow	Red	Notes / Owner
Phones, patient portals, records access, and core systems have clear ownership and escalation paths.				
Your team knows what happens when an EHR, portal, phone, or network issue slows patient communication.				
Downtime procedures are understood by both operational and technical stakeholders.				
Recurring system slowdowns are tracked, reviewed, and connected to a practical next step.				

2. Security & Breach Readiness

Question	Green	Yellow	Red	Notes / Owner
Sensitive patient information is protected by documented controls your leadership team understands.				
Access permissions are reviewed often enough to match staffing and role changes.				
Your organization can produce evidence of key safeguards when a funder, auditor, or compliance need arises.				
Leadership understands who to call, what to preserve, and what to do first if a suspected breach occurs.				

3. Support Responsiveness & Ticket Flow

Question	Green	Yellow	Red	Notes / Owner
Staff know how to request help and can see progress without chasing updates repeatedly.				
The support model reduces stuck tickets instead of creating another bottleneck.				
Common issues are translated into plain language for non-technical stakeholders.				
Support interactions are professional, patient, and easy for clinical and administrative staff to navigate.				

4. Internal Team Capacity & Specialist Depth

Question	Green	Yellow	Red	Notes / Owner
Your IT coverage is not dependent on one or two people knowing everything.				
Specialized needs such as security, systems performance, applications, and planning can be handled without starting from scratch each time.				
Your internal team has enough support to move from reactive work to higher-value priorities.				
Outside consultation costs are predictable enough for leaders to plan responsibly.				

5. Leadership Decision Support

Question	Green	Yellow	Red	Notes / Owner
Technology choices come with clear options, tradeoffs, cost impact, and implementation implications.				
Non-technical leaders receive enough context to make informed decisions without being overwhelmed.				
The team can define guardrails before researching a new tool, requirement, or improvement.				
Recommendations connect technical decisions to operational, security, financial, and user impacts.				

6. Future Planning, Compliance Needs, & AI Readiness

Question	Green	Yellow	Red	Notes / Owner
New requirements, feature requests, and funder expectations are evaluated before tools are chosen.				
Your organization has a responsible path for exploring AI or automation without skipping security and workflow questions.				
Training and knowledge transfer help internal staff use systems more confidently.				
Technology planning supports the organization you are becoming, not just the issues in front of you today.				

Next Step

Choose the two **Yellow** or **Red** items that create the most friction, risk, or uncertainty. For each one, define the decision needed, the information missing, the owner, and the date you will revisit it.

Priority Area	Decision Needed	Information Missing	Owner / Date

Use this as a discussion tool with leadership, compliance, operations, finance, and IT. The goal is not to create a longer task list, but rather, to serve as a helpful tool to make the next technology decision clear and actionable.