Palo Alto Health Labs

Practice technology health check: 25 questions for practice owners

Not legal advice. Not a compliance certification.

Audience: Private-practice physicians, owners, and administrators.

Review alias _____ / worksheet version _____ / review date and zone _____
Scope aliases (systems/workflows only) _____ / reviewer roles _____

Instructions and boundaries

For every question, select **documented / needs review / unknown / not applicable** and add rationale. “Documented” means evidence exists, not that a reviewer has found it adequate. Explain not applicable; do not use it to bypass an unresolved question. Use the same answer fields beneath each question. For multiple systems, repeat the answer block using neutral aliases while retaining the original question number.

Use generic owner roles, neutral system aliases, and restricted evidence-reference codes only. Do not enter patient identifiers, actual records, screenshots, production logs, credentials, keys, personal contact details, or sensitive contract contents. Do not attach evidence or provide access-bearing links. Real evidence stays in approved restricted systems; there are no uploads. Any demonstration material should be entirely invented and labeled MOCK/SYNTHETIC.

Distinguish **policy evidence** (the written instruction) from **operational evidence** (what was checked, tested, changed, or observed, with date and scope). A policy alone does not demonstrate operation. Record both references where useful without copying their contents.

These are proposed management questions, not legal mandates or an exhaustive review. Do not total answers, assign scores, ratings, maturity levels, probabilities, penalty predictions, or compliance verdicts. Even all documented responses do not establish readiness, certification, clinical safety, or launch clearance. This worksheet is not a HIPAA risk analysis, legal opinion, clinical-safety approval, or replacement for qualified legal, security, and clinical specialists.

Suspected active incident: promptly escalate through approved channels to responsible responders and leadership, involving counsel as appropriate. Never wait for completion or booking. Authorized teams should coordinate evidence preservation, safe containment, and clinical continuity; this worksheet is not an incident procedure.

A. Practice ownership and EHR workflows

1. Which essential systems and workflows are included in this review, and which owner role can approve technology decisions across them?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

2. Which system is treated as authoritative for each workflow, and who resolves conflicting or stale information between systems?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

3. Which EHR interfaces read, write, or exchange information, and who owns their configuration, failure detection, and repair?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

4. Which manual re-entry, inbox, spreadsheet, or paper workarounds support EHR workflows, and who checks that pending work is reconciled?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

5. What evidence separates a written workflow or change policy from an observed test, accepted handoff, or completed operational check?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

B. Vendor scope, renewal, and exit

6. Where is the current agreement reference for each exact service, module, environment, and account, including exclusions and unresolved legal-review questions?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

7. How are practice, vendor, and MSP responsibilities divided for configuration, support, security, interfaces, and incident escalation?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

8. Which owner tracks renewal and termination notice dates from actual agreements and obtains decisions before those dates?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

9. Who owns usable data exports during service and at termination, and what restricted evidence shows that the expected format can be retrieved and reviewed?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

10. Who coordinates exit assistance, continuing access, interface handoff, and counsel review of retention, deletion, or preservation questions before service ends?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

C. Accounts, security, and workforce changes

11. Which role reviews staff and administrator permissions against actual job needs, and where is evidence of the latest review kept?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

12. Which service accounts, API connections, and non-person accounts exist, and who owns their purpose, permissions, credential handling, and continuity?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

13. What restricted evidence shows that departures, role changes, and vendor transitions resulted in the intended access changes across connected systems?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

14. Who checks that agreed security settings, authentication arrangements, device protections, and updates operate as intended rather than merely appearing in a policy?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

15. How do staff find approved incident escalation procedures and learning materials, and what evidence shows the procedures have been explained or rehearsed?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

D. Backup, recovery, and service continuity

16. Which systems, configurations, and information categories are covered or excluded by each backup arrangement, and who verifies the boundary?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

17. What restricted reference records the latest authorized restore test, what was actually recovered, and which failures remain unresolved?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

18. Which owner maintains a downtime workflow for essential services and coordinates clinical review of continuity arrangements separately from technical recovery?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

19. Who can authorize recovery or a reversible change, and what evidence shows that operators understand reconciliation, rollback, and escalation responsibilities?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

E. AI, unofficial tools, and follow-through

20. Which AI and coding tools receive prompts, files, generated outputs, telemetry, or support information, and where are their data routes documented?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

21. Which exact model services, accounts, environments, and downstream providers are in use, and who reviews their contract scope, data-use terms, and unresolved agreement questions?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

22. Which unofficial spreadsheets, forms, browser extensions, automations, and physician-built apps are used, and who owns their purpose, sharing boundaries, and approval status?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

23. Who maintains each unofficial tool when its creator is absent, including source/configuration ownership, dependency changes, support, and a retirement or replacement decision?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

24. Who coordinates separate legal, security, and clinical review of proposed uses and changes, with unresolved questions recorded rather than inferred as approved?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

25. Which authorized owner accepts each next action, assigns execution responsibility, and sets a follow-up date or review trigger without treating this worksheet as permission to launch?

Evidence status _____ / rationale _____

Generic owner role _____ / restricted reference(s), date and scope _____

Next action _____ / action owner role _____ / follow-up date or trigger _____

Handoff without a verdict

Bring unresolved questions to the appropriate owner or specialist using approved internal channels. Confirm who accepts follow-up; do not interpret silence or a completed sheet as authorization. Keep this working copy and real evidence in their approved locations. Do not send sensitive details through a booking inquiry.

Limits

No PAHL/Mike compliance, BAA, availability, implementation, clinical-panel, or outcome promise is made.

Book a free 30-minute audit

This worksheet does not contain a scheduling link. The phrase above is the offer label, not a completed audit or a certification.