



Remote Desktop Support Checklist

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Purpose of This Manual

This checklist is made to assist IT Support Specialists/Help Desk Support in effectively preparing for and managing remote desktop support sessions. Pre-session setups, in-session protocol, and post-session tasks will be covered to ensure secure and efficient remote assistance.



Pre-Session Support Checklist

Before initiating a remote support session, confirming the following:

- ☐ *User has been Contacted & Informed*

Confirm with the user that they are aware of the remote session and they have given consent.

- ☐ *Remote Tool has been Installed & Approved*

Ensure the correct access tool has been installed (ex, TeamViewer, AnyDesk, etc.) and authorized by IT.

- ☐ *Internet Connection is Stable*

Confirm both parties have a reliable connection to avoid possible interruptions.

- ☐ *User is logged in & Ready*

Ask the user to log into their device and close any personal or unrelated content.

- ☐ *Access Credentials Verified*

Ensure admin credentials (if applicable) are available for tasks requiring elevated permissions.



During the Support Session

While connected to the user's device, follow this checklist:

- ☐ *Confirm Audio or Chat Access*

Ensure communication can be maintained through phone, chat, or voice call.

- ☐ *Explain Actions Before Taking Them*

Walk the user through what you're doing, especially if installing or uninstalling software.

- ☐ *Document All Changes Made*

Keep a running log of any system changes, fixes, or installations for future reference.

- ☐ *Avoid Accessing Private Files*

Maintain user privacy by staying out of unrelated folders or applications.

- ☐ *Confirm Fix*

Confirm the issue has been resolved and ask the user if they need anything else resolved before disconnecting.



Post-Session Support Checklist

After the session ends:

- ☐ *Log the Ticket/Session Notes*

Record session details in the ticketing system, including the problem, actions taken, and resolution status.

- ☐ *Schedule Follow-Up (If Applicable)*

If the issue needs monitoring or follow-up, schedule accordingly and notify the user.

- ☐ *Verify Disconnection*

Make sure the remote session has been properly disconnected and access is revoked if temporary credentials were used.

- ☐ *Send Summary Email (If Applicable)*

Send a brief summary to the user including what was done and the next steps, if applicable.



Best Practices

- *Always get verbal or written permission before accessing a device*
- *Respect user privacy and maintain a professional tone throughout*
- *Use company-approved remote support tools only*
- *Double-check all updates and installations before ending the session*