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 to ensure secure and efficient remote assistance will be covered.

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, ect.) 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 communicate is able to 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 references.

- *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 Disconection*
  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*