



# Remote Support Checklist

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## Session Info

- User Name: \_\_\_\_\_
  - Employee ID / Student ID: \_\_\_\_\_
  - Ticket Number: \_\_\_\_\_
  - Date: \_\_\_\_\_
  - Support Agent: \_\_\_\_\_
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## Pre-Support Session

- ☐ Confirm user's name, contact info, and issue summary
- ☐ Ask for consent to access their device remotely
- ☐ Verify device type and operating system (Windows/macOS/Linux)
- ☐ Instruct user to download the selected remote access tool:
  - AnyDesk
  - Chrome Remote Desktop
  - Remote Desktop (RDP - internal only)

☐ Schedule or begin remote support session

☐ Ensure both sides have stable internet

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## **During the Session**

☐ Start session with screen share or remote control

☐ Use built-in communication (Zoom chat, call) to guide user

☐ Perform basic diagnostics:

- `ping` to test connectivity
- `ipconfig` or `ifconfig` for IP information
- Check device status in Device Manager

☐ Perform troubleshooting actions:

- Software install/update
- Driver reinstallation
- Browser or OS troubleshooting

☐ Share files via secure method (Google Drive, OneDrive)

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## **Security Checklist**

☐ Never request or store user passwords

- ☐ Avoid unnecessary file access
  - ☐ Enable screen blanking or restrict control if necessary
  - ☐ Only access what's required to resolve the issue
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### **Post-Support Session**

- ☐ Confirm issue is resolved or escalate if needed
- ☐ Log the session: time, issue, and actions taken
- ☐ Remove any leftover temporary tools if installed
- ☐ Instruct user to uninstall remote access app (if not persistent)
- ☐ Send follow-up email or instructions for next steps