

New Office Technology Planning Checklist

A fillable checklist for opening, relocating, or remodeling a healthcare or commercial office. Use it to plan internet, cabling, Wi-Fi, phones, cameras, access control, workstations, software, payments, imaging, cybersecurity, backups, and opening-day support.

Use this with your IT rep early.

Mark up the floor plan, confirm vendor requirements, and make the online presence ready before patients start searching. The cheapest time to fix the technology plan is before construction starts.

Planning Decisions That Affect Your Budget

- ☐ Practice-management system, EHR, PMS, and imaging software
- ☐ CBCT manufacturer and exact model when possible
- ☐ Where 3D images need to be viewed and manipulated
- ☐ Business internet provider and backup internet plan
- ☐ VoIP phone provider and call routing needs
- ☐ Credit card/payment processing system and terminal locations
- ☐ Indoor cameras, outdoor cameras, and access control
- ☐ Staff count at opening, 6 months, and 12 months
- ☐ Which rooms open now and which are wired for future growth
- ☐ Website, domain, business email, and Google Business Profile ownership
- ☐ Online scheduling, patient forms, review links, and website contact forms

6-12 Months Before Opening

- ☐ Choose or narrow down your practice-management system, EHR, PMS, imaging software, and major clinical software.
- ☐ Request written hardware, network, workstation, server, and internet requirements from software vendors.
- ☐ Decide whether the office will use cloud software, a local server, or a hybrid setup.
- ☐ Plan a dedicated IT closet, technology room, or network wall with power, airflow, wall space, and service access.
- ☐ Make room for the rack, firewall, switches, patch panel, modem, battery backup, NVR, server/NAS if needed, and future expansion.
- ☐ Decide whether you want indoor cameras, outdoor cameras, access control, background music, paging, TVs, or waiting-room displays.
- ☐ Estimate staff count at opening, 6 months, and 12 months so desks, chairs, rooms, and computer purchases can be planned intelligently.
- ☐ Identify which operatories, exam rooms, offices, and desks need computers on day one and which can be wired now but left empty.
- ☐ Create a real technology budget for cabling, network equipment, Wi-Fi, phones, cameras, computers, cybersecurity, backup, and support.

6-12 Months Before Opening continued

- ☐ Bring your IT rep into the planning process early so the office layout, vendor requirements, and budget work together.

3-6 Months Before Opening

- ☐ Confirm your practice-management system, imaging software, and major clinical applications.
- ☐ Choose your CBCT manufacturer at minimum, and the exact model if possible.
- ☐ Confirm pano, CBCT, X-ray, intraoral scanner, sensor, lab, and specialty equipment network requirements.
- ☐ Decide where 3D imaging will be captured and where 3D images need to be viewed.
- ☐ Identify which computers need higher-performance 3D specs and which only need standard charting or 2D imaging specs.
- ☐ Choose or narrow down your VoIP phone provider and confirm phone/data/PoE requirements.
- ☐ Choose or narrow down your credit card/payment processing system and how terminals connect to the internet or PMS.
- ☐ Begin checking which business internet providers actually service the building.
- ☐ Ask whether service is already live in the building or whether construction is required to bring service in.
- ☐ Consult with your IT rep to review the floor plan with low-voltage, equipment, software, phone, payment, internet, and general contractor contacts.

5 Months Before Opening

- ☐ Work with your IT rep to mark every workstation, front desk, checkout, consult room, doctor office, manager office, lab, sterilization, and clinical computer location.
- ☐ Work with your IT rep to mark which workstations need 3D imaging capability and which only need standard business/charting/2D capability.
- ☐ Work with your IT rep to mark every printer, scanner, label printer, payment terminal, phone, Wi-Fi access point, camera, TV, display, speaker, and access-control door.
- ☐ Confirm the network rack and internet handoff location.
- ☐ Confirm where the modem, firewall, switches, patch panels, battery backup, NVR, server, NAS, or backup equipment will live.
- ☐ Add extra drops for future operatories, desks, imaging, cameras, access points, and staff growth.
- ☐ Confirm electrical outlets near computers, printers, payment devices, TVs, network gear, and specialty equipment.
- ☐ Require cable labeling at both ends.

4 Months Before Opening

- ☐ Have the low-voltage team run cabling according to the marked-up plan reviewed with your IT rep.
- ☐ Run low-voltage cabling for workstations, phones, cameras, access points, printers, scanners, payment devices, TVs, and specialty equipment.
- ☐ Run cabling for CBCT, pano, X-ray, lab, access control, and outdoor cameras according to vendor and site requirements.
- ☐ Confirm Wi-Fi access point cabling is in the correct ceiling locations.
- ☐ Confirm camera angles, outdoor mounting locations, and door/access-control wiring before finishes are complete.
- ☐ Confirm cabling does not conflict with electrical, plumbing, HVAC, cabinetry, or clinical equipment.
- ☐ Test and label all cable runs.

4 Months Before Opening continued

- ☐ Photograph cable routes, wall locations, and ceiling locations before drywall closes.

3 Months Before Opening

- ☐ Order firewall, switches, access points, patch panels, rack, battery backup, cameras, NVR, phones, and access-control hardware.
- ☐ Order standard workstations and higher-performance 3D imaging workstations where needed.
- ☐ Order monitors, keyboards, mice, mounts, docking stations, printers, scanners, label printers, card readers, and payment devices.
- ☐ Confirm server, NAS, cloud storage, endpoint protection, backup, remote support, and cybersecurity requirements.
- ☐ Create a naming system for computers and network devices.
- ☐ Build an inventory list for equipment, serial numbers, warranties, logins, and support contacts.
- ☐ Review the final equipment list with your IT rep before ordering so you do not overbuy, underbuy, or miss specialty requirements.
- ☐ Coordinate installation dates with construction, equipment, software, phone, internet, and payment vendors.

1-2 Months Before Opening

- ☐ Work with your IT rep to confirm which business internet providers actually service the building.
- ☐ Confirm whether the provider already has service in the building or must run new service.
- ☐ Confirm installation dates in writing and verify the internet handoff location matches your network closet.
- ☐ Confirm static IP needs for VPN, remote access, cameras, servers, or vendor requirements.
- ☐ Plan backup or temporary internet if wired service may not be ready by opening day.
- ☐ Consider temporary cellular internet, fixed wireless, or satellite options like Starlink if the building is not ready.
- ☐ Set up or claim the Google Business Profile.
- ☐ Confirm the Google Business Profile name, address, phone number, website, hours, services, service area, and opening date.
- ☐ Confirm the website is live or close enough to soft-launch before patients start searching for the office.
- ☐ Test website contact forms, online scheduling links, patient intake forms, and click-to-call buttons.
- ☐ Have your IT rep install and configure the firewall, switches, Wi-Fi, battery backup, private office Wi-Fi, and guest Wi-Fi.
- ☐ Have your IT rep coordinate phones and test inbound calls, outbound calls, voicemail, call routing, after-hours routing, and emergency routing.
- ☐ Install and test credit card/payment processing devices and confirm they can communicate with the internet or PMS/EHR if required.
- ☐ Install cameras, confirm recording, set up remote viewing, install access control, and test each controlled door.

1 Month Before Opening

- ☐ Install front desk, checkout, consult room, clinical, doctor office, manager office, lab, and back-office workstations.
- ☐ Install higher-performance 3D imaging workstations where needed and standard workstations where appropriate.
- ☐ Install monitors, printers, scanners, label printers, card readers, payment devices, and specialty devices.

1 Month Before Opening continued

- ☐ Install practice-management, EHR/PMS, imaging, communication, accounting, forms, and payment software.
- ☐ Have your IT rep coordinate with software vendors for setup and testing.
- ☐ Confirm CBCT, pano, X-ray, sensors, intraoral scanner, and imaging bridge workflows.
- ☐ Confirm scanner workflows, printer mapping, label printing, user accounts, permissions, endpoint protection, remote support, updates, and backup.
- ☐ Perform a test restore from backup and create an opening-day support plan.

2 Weeks Before Opening

- ☐ Test patient check-in, scheduling, charting, imaging capture, 3D viewing, checkout, and payment processing.
- ☐ Test receipt printing, label printing, scanning, document workflows, and printer mapping.
- ☐ Test phone routing during business hours and after hours, plus voicemail notifications.
- ☐ Test Wi-Fi coverage in every patient, staff, and clinical area.
- ☐ Test guest Wi-Fi, cameras, remote access, access-control doors, staff logins, and vendor support contacts.
- ☐ Confirm admin passwords are documented and staff knows who to call for technology problems.

1 Week Before Opening

- ☐ Walk the entire office and verify every workstation, printer, phone, camera, access point, payment terminal, and network device.
- ☐ Confirm cables are labeled, computers are named, staff accounts are ready, and software vendors have completed setup.
- ☐ Confirm backups are running, endpoint protection is active, phones are live, cameras are recording, Wi-Fi is stable, and payments work.
- ☐ Confirm remote support works and prepare a quick-reference support sheet for staff.

Opening Day

- ☐ Have IT support available during opening hours.
- ☐ Watch for printer, scanner, login, phone, payment, and software issues.
- ☐ Confirm calls are coming through, payments are processing, front desk workflow is smooth, and clinical computers are working.
- ☐ Track issues and clean them up quickly.

30 Days After Opening

- ☐ Review recurring support issues, Wi-Fi coverage, phone routing, camera angles, access-control permissions, and payment reliability.
- ☐ Confirm backups are still running and test restore again.
- ☐ Review endpoint protection, remove unused accounts, update documentation, and plan any needed additional drops or devices.

90 Days After Opening

- ☐ Review network, workstation, phone, payment, imaging, backup, cybersecurity, camera, and staff pain points.
- ☐ Update documentation and decide whether ongoing monthly IT support is needed.

Need help turning this checklist into a real plan?

Revv Tech can help review the floor plan, coordinate vendor requirements, and translate your office vision into cabling, network, phone, payment, camera, access-control, workstation, imaging, and support requirements.

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