

Monthly IT Health Snapshot Template

Designed for IT Teams & MSPs

Use this monthly snapshot to capture changes, risks, and adjustments across your environment.

Access & Permissions Summary

New privileged accounts created: _____

Permissions modified or escalated: _____

Accounts removed or disabled: _____

Notes/Concerns:

Automation & Workflow Status

Failures or skipped tasks observed: _____

Automations needing review or fixes: _____

Unexpected automation behavior: _____

Configuration Alignment Review

Areas that drifted from baseline: _____

Systems needing realignment or updates: _____

Unplanned configuration changes detected: _____

New Apps, Tools, or Extensions Detected

New items introduced this month: _____

Source of discovery (who added it / how it appeared): _____

Approved/Not approved: _____

Potential risks or follow-ups: _____

Alerts, Logs & Incident Overview

Were all logs & alerts functioning as expected? ☐ Yes ☐ No

Incidents or anomalies worth noting: _____

Gaps in logging or alerting that need attention: _____

Risk & Exposure Check

New risks identified: _____

Potential impacts: _____

Recommended mitigation steps: _____

Monthly Summary & Follow-Ups

Top 3 concerns:

- 1.
- 2.
- 3.

Actions to complete next month:



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