

CLOUD SERVICE / DEFINE THE PROPOSED USE

Before the first upload.

For the business owner, IT contact and relevant data/compliance reviewer. Describe the proposal without copying actual client or patient records into this worksheet.

Proposed app / provider / subscription

Business owner / review date

Business purpose and intended users

01 Map the data and its route

Record categories, approved sources and intended recipients. Include proposed integrations. Use only an approved nonsensitive example for demonstrations.

Data category	Current source	Recipient / connection	Proposed pilot limit

IT reviewer / established contact route

Required data / legal / compliance reviewer

Do not enter passwords, setup codes, payment secrets or real sensitive records. This planning aid is not authorization to upload data or certification of security or compliance.

Review the boundaries.

Keep current provider documents, account scope and unresolved questions together. A feature demonstration does not approve every data category or integration.

Sources checked October 30, 2026: NIST SP 1300 and HHS cloud guidance.

02 Collect evidence for the proposed use

Access and administration

Approved sign-in, roles, removal process and responsible administrator.

Evidence link / reference, answer or open question

Data use and responsibility

Permitted uses, provider/customer tasks, relevant terms and settings.

Evidence link / reference, answer or open question

Recovery, export and exit

Usable export, recovery options, account closure and deletion scope.

Evidence link / reference, answer or open question

Support and agreements

Notice route, response commitments and required contract/compliance review.

Evidence link / reference, answer or open question

03 Record the decision; keep open issues visible

Decision / restrictions / next review date

Unresolved item / responsible owner / due date
