
RESOURCE 05 | DON'T CLICK YET COMPANION RESOURCE**Backup Plan Worksheet**

Companion resource for Don't Click Yet. Referenced on page 175.

Purpose: Plan what gets backed up, where it is stored, and how often you review it.

Storage reminder: If you complete this worksheet with sensitive information, store the finished copy somewhere safe.

A backup plan protects the files, photos, records, and information you would not want to lose if a phone disappeared, a laptop failed, an account was locked, ransomware appeared, or a mistake deleted something important.

The goal is not to back up everything perfectly. The goal is to identify what matters most and make sure it exists in more than one place.

A good backup plan should answer four questions:

1. What would hurt to lose?
2. Where is it stored now?
3. Where is the backup?
4. Have I tested recovery?

Use this worksheet to create a plan you can maintain.

What Would Hurt to Lose?

Start with the files and information that would cause the most stress, sadness, financial trouble, legal trouble, or inconvenience if lost.

Check the items that matter to you:

- Family photos
- Family videos
- Phone contacts
- Text messages or important conversations
- Tax records
- Legal documents
- Insurance documents
- Medical records
- Identity document scans
- Estate or inheritance documents
- Home or mortgage documents
- Lease documents
- School records
- Work files
- Business or freelance records
- Client files
- Invoices or accounting records
- Password recovery information
- MFA backup codes
- Family history documents
- Personal writing, research, or creative work
- Other: _____

Files or information I would be most upset to lose:

1. _____
2. _____
3. _____
4. _____
5. _____

Device Inventory

List the devices that may hold important files, photos, contacts, or documents.

Device	What Important Data Is On It?	Is It Backed Up?	Backup Location	Notes
Phone		☐ Yes ☐ No ☐ Not sure		
Laptop		☐ Yes ☐ No ☐ Not sure		
Desktop computer		☐ Yes ☐ No ☐ Not sure		
Tablet		☐ Yes ☐ No ☐ Not sure		
External drive		☐ Yes ☐ No ☐ Not sure		
Old device		☐ Yes ☐ No ☐ Not sure		
Other		☐ Yes ☐ No ☐ Not sure		

Phone Backup

Phones often hold the most emotionally important files: photos, videos, contacts, messages, notes, and authentication tools.

Phone type:

- ☐ iPhone
☐ Android
☐ Other: _____

Phone account used for backup:

Examples: Apple ID, Google account, Samsung account, Microsoft account.

Photos backed up?

- ☐ Yes
☐ No
☐ Not sure

Contacts backed up?

- ☐ Yes
☐ No
☐ Not sure

Messages backed up?

- ☐ Yes
- ☐ No
- ☐ Not sure
- ☐ Not needed

Notes backed up?

- ☐ Yes
- ☐ No
- ☐ Not sure
- ☐ Not needed

Authenticator app or MFA method backed up or transferable?

- ☐ Yes
- ☐ No
- ☐ Not sure
- ☐ Not applicable

Cloud storage enough for current backup?

- ☐ Yes
- ☐ No
- ☐ Not sure

Last time I confirmed photos were visible from another device:

Last time I confirmed contacts were recoverable:

Notes:

Computer Backup

Computers may hold documents, downloads, tax files, photos, work files, browser data, and old records that never made it to the cloud.

Computer type:

- ☐ Windows
- ☐ Mac
- ☐ Chromebook
- ☐ Other: _____

Important folders on this computer:

- Desktop
- Documents
- Downloads
- Pictures
- Videos
- Music
- Tax folder
- Business folder
- Client folder
- Scanned documents
- Other: _____

Main backup method:

- ☐ Cloud storage or sync
- ☐ Dedicated cloud backup service
- ☐ External drive
- ☐ Network drive
- ☐ Manual copy
- ☐ Not currently backed up
- ☐ Not sure

Backup service or drive name:

What is included in the backup:

What is not included but should be:

Last backup date:

Last recovery test date:

Notes:

Cloud Storage and Sync

Cloud storage can be useful, but cloud sync is not always the same as backup. Confirm what is actually protected.

Cloud service used:

Examples: iCloud, Google Drive, OneDrive, Dropbox, Box, Proton Drive, other.

Account email:

Where the account password is stored:

MFA enabled on cloud account?

- ☐ Yes
☐ No
☐ Not sure

What is stored or synced here:

- Photos
- Documents
- Desktop folder
- Phone backup
- Computer backup
- Shared family files
- Business files
- Tax or legal documents
- Other: _____

Storage limit enough?

- ☐ Yes
☐ No
☐ Not sure

Version history or deleted file recovery available?

- ☐ Yes
☐ No
☐ Not sure

I understand what happens if I delete a file locally:

- ☐ Yes
☐ No
☐ Not sure

I have tested access from another device:

- ☐ Yes
☐ No
☐ Not yet

Notes:

External Drive Backup

An external drive can add another layer of protection, especially for important files, photos, and documents. It should not remain connected all the time unless you understand the risks and purpose.

External drive brand or name:

Drive location:

What is backed up to this drive:

How often this drive is updated:

- ☐ Weekly
☐ Monthly
☐ Every few months
☐ After major document changes
☐ Not scheduled yet
☐ Other: _____

Drive is disconnected after backup?

- ☐ Yes
☐ No
☐ Not sure

Drive is encrypted or password-protected?

- ☐ Yes
☐ No
☐ Not sure
☐ Not needed

Last backup date:

Last recovery test date:

Notes:

Important Documents

Use this section to identify documents that should be protected, organized, and recoverable.

Document Type	Current Location	Backup Location	Sensitive?	Notes
Tax records			☐ Yes ☐ No	
Legal documents			☐ Yes ☐ No	
Insurance documents			☐ Yes ☐ No	
Medical documents			☐ Yes ☐ No	
Identity document scans			☐ Yes ☐ No	
Home or lease records			☐ Yes ☐ No	
Business records			☐ Yes ☐ No	
Password recovery documents			☐ Yes ☐ No	
MFA backup codes			☐ Yes ☐ No	
Other			☐ Yes ☐ No	

Sensitive File Protection

Some files need both backup and privacy. These may include identity documents, tax returns, medical records, legal papers, financial statements, recovery codes, and password manager emergency instructions.

Sensitive files I need to protect:

1.

2.

3.

4.

5.

Where sensitive files are stored:

How sensitive files are protected:

-
- Password manager secure note
 - Encrypted folder
 - Protected cloud folder
 - External drive stored safely
 - Printed copies in safe location
 - Attorney or estate file
 - Other: _____

Trusted person who knows how to find them in an emergency, if applicable:

Notes:

Business or Freelance Backup

Use this section if you run a small business, freelance, manage client files, invoice customers, or depend on digital records for income.

Business name or description:

Important business files:

- Client files
- Contracts
- Invoices
- Accounting records
- Tax records
- Website files
- Domain or hosting records
- Email archives
- Project files
- Marketing files
- Other: _____

Where business files are stored:

Backup method:

How often business files are backed up:

Client or sensitive data included?

- ☐ Yes
☐ No
☐ Not sure

Trusted person or professional who can help if I lose access:

Notes:

Recovery Test

A backup is much more trustworthy after you have tested it. Choose one file and restore or open it from the backup location.

Test file name or description:

Backup location tested:

Date tested:

Was the file recoverable?

- ☐ Yes
☐ No
☐ Partly
☐ Not sure

Could I open and use the file?

- ☐ Yes
☐ No
☐ Not sure

What I learned from the test:

What needs to be fixed:

Backup Schedule

Choose a routine you can maintain. A simple routine that actually happens is better than a complicated routine that is abandoned.

My backup routine:

- Phone photos and contacts back up automatically.
- Important computer folders sync to cloud storage.
- External drive backup happens on a schedule.
- Business files are backed up separately.
- Sensitive files are stored securely.
- Recovery is tested periodically.

How often I will check backup status:

- ☐ Monthly
☐ Every three months
☐ Twice a year
☐ Once a year
☐ Other: _____

When I will do this review:

Example: first Saturday of the month, tax season, birthday month, after major family events.

Trusted person who can help, if needed:

If a Device Fails

Write the first steps you will take if your phone, laptop, or computer fails.

If my phone is lost, stolen, or broken, I will:

If my laptop or computer fails, I will:

If cloud access fails or I am locked out, I will:

Trusted support contact:

If Files Are Deleted or Changed

If important files are deleted, overwritten, corrupted, or changed unexpectedly, do not panic. Stop and check whether your backup or cloud service has version history or deleted file recovery.

Where I will check first:

Who can help me recover files:

What I should avoid doing until I understand the problem:

If Ransomware or Malware Is Suspected

If files suddenly become unreadable, strange ransom messages appear, or a computer behaves as if files have been locked, stop using the device and seek help. Do not connect backup drives to an infected or suspicious computer unless a trusted professional advises you to do so.

My first steps will be:

- Disconnect the device from the internet.
- Do not connect backup drives.
- Do not sign in to important accounts from the affected device.
- Contact a trusted professional or knowledgeable helper.
- Preserve evidence by taking photos or screenshots if safe.
- Use another trusted device for important account protection.

Trusted professional or helper:

Notes:

Backup Review Log

Review your backup plan regularly and after major changes, such as a new phone, new computer, new cloud account, major life event, business change, or important document update.

Review date: _____
Reviewed by: _____
What was checked: _____

Recovery tested?

☐ Yes
☐ No
☐ Not this time

Changes needed: _____

Review date: _____
Reviewed by: _____
What was checked: _____

Recovery tested?

☐ Yes
☐ No
☐ Not this time

Changes needed: _____

Review date: _____
Reviewed by: _____
What was checked: _____

Recovery tested?

☐ Yes
☐ No
☐ Not this time

Changes needed: _____

Final Reminder

A backup plan is not about saving every file forever. It is about making sure the files, photos, documents, and records that matter most are not trapped in one fragile place.

Do not assume backup is working.

Check it.

Test it.

Then keep the routine simple enough to continue.