APPENDIX B

CITRIX SERVER CHECKLIST

(Required to be submitted with each request to conduct an examination project)

Please complete this checklist for each examination project requested for hosting on the NAIC Citrix Server and forward to the NAIC Help Desk, [help@naic.org](mailto:help@naic.org). States may be contacted to discuss further details of the examination and to address technical questions.

**State and Name of Requestor:**

**Primary State-Contact for this Exam:**

**Project Name/Company(s) and Cocode(s) under examination:**

**Citrix Server Requirements**:

1. Has your state signed the Master Information Sharing and Confidentiality Agreement?

2. Has your state signed the Citrix Server Agreement with the NAIC?

3. Does your state currently utilize the following operating systems and browser?

Windows 7 or higher

Internet Explorer v9 or higher

FireFox v20 or higher

4. Will a Cable/DSL/T1 line be provided by the company to allow access to the Internet?

(Note: Please be aware that cellular providers’ wireless cards are high latency and have been known to cause issues with disconnection to the Citrix server and TeamMate application.)

**Examination Details:**

5. Are you coordinating the exam with any other state(s)?

If yes, please list the state, primary contact person and contact information (email and phone number) for each state participating in the project.

6. Will the state department be facilitating the exam or will it be outsourced to a contract examiner?

7. How many financial examiners will be participating on the exam (estimate)?

State Examiners

Contract Examiners

8. Estimate the average number of concurrent users on the Citrix server for this exam

9. Do you anticipate a large number of scanned documents for this exam file?

(Note: Exams hosted on the server will only be permitted to utilize an exception scanning method)

10. Estimate the size of the exam upon completion

11. If participating, have all contract examiners signed a confidentiality agreement with your state department?

12. Please list the TeamMate Project Code and Project Name that will be assigned to this project.

13. What is the anticipated date the exam will be uploaded to the NAIC Citrix Server?

14. When is the anticipated completion date of the exam?

**TeamMate:**

15. Do all participating state examiners have current TeamMate licenses?

16. Do all participating contract examiners have current TeamMate licenses?

17. If contracts examiners are utilizing state department TeamMate licenses, does your state have enough licenses for them to use?

18. What version of TeamMate is your state utilizing?   
  
 (Note: TeamMate project versions R8, R9, R10 are no longer accepted on the NAIC Citrix Server)

19. Please provide the following information for all users participating in the project who do not currently have a Citrix User ID for TeamMate 11.

* Name
* Employer
* Title
* Phone Number
* Email Address