Finance and Insurance Safety Orientation

Ask your supervisor at an approved meeting point. Type here or print all three pages.

Confirm the training and permission for your actual work

General workplace awareness only. Your employer separately confirms task training, skills and permission. This overview does not authorize security duties, climbing or roof access, equipment testing, restricted entry or emergency response. The worksheet is not a qualification.

Allow 30 to 60 minutes total for the online orientation and the walkthrough with your supervisor.

If you are unsure, stop and ask.

It is okay not to know the answer. It is not okay to pretend you do. Questioning is how we learn.

Learner or team member

Supervisor or host contact

Company, location and approved meeting point

Walkthrough date

Role, work setting and shift - choose a path on page 3

01 / Before entry or the first task

Who confirms my assignment and backup support? Which tasks and equipment are outside my role?

Which task training and youth age/hour limits apply? What instruction and permission are still needed?

Show permitted routes and restricted areas. Who confirms host access, visitor rules and handoffs?

Find it together

Use a permitted safe place. Do not drive, climb, test alarms or equipment, or enter restricted areas for this worksheet.

Do not record security codes, detailed security layouts or customer information. Use the employer-approved process for private security instructions. In an emergency, get help promptly from a safe place; a routine question must not delay help.

How do I call emergency help? What location and responder entrance should I give?

Show exits, alarms and the meeting point. Who accounts for people or arranges help?

Who is my main contact and backup? What do I do if I cannot reach either person?

Where are first aid supplies and any AED? Who is trained to give first aid?

How do I report threats or customer conflict? Show my part in the site security plan.

Where are fire extinguishers? What is my role? Locating one does not permit firefighting.

Where are labels and SDS? Who handles spills or unknown products?

Which PPE and footwear does this task need? Who checks fit and replaces damaged items?

What is the plan for field visits, travel, lone work, check-ins and lost contact?

Walk the plan through

Explain the agreed plan in your own words and name who will close each open item.

02 / Connect the basics to your work area

Bank and credit-union branches
Who handles customer conflict and confirms my security and emergency role?
Lending and loan servicing
Who checks workstation fit, file handling and customer visit arrangements?
Securities and investment offices
How do we manage screen work, long calls and reporting discomfort?
Insurance office and service work
Who explains unfamiliar tasks, labels, equipment and help contacts?
Insurance claims field visits
Who confirms site access, travel, check-ins and changes before a visit?

What handling aids may I use? Who handles damaged cords or equipment, and which tasks must wait?

Who helps adjust my workstation and workload? How do I report fatigue or repeated discomfort?

In my own words, what is the safe plan for my first assignment, and when will I stop and ask?

What remains unresolved, and which task or area must wait until the answer is confirmed?

Who owns each open item? Record the answer-by date/time and how we will confirm it before affected work.

03 / Acknowledge the discussion

We discussed the local plan and open items. The employer separately records required instruction, skills and work permission. These names confirm a discussion, not certification, task qualification, security duties or permission to enter restricted areas.

Learner name and acknowledgement date

Supervisor name and acknowledgement date