

ORGANIZATION POSITIONS

Insurance Workbook Guide

Make your usual insurance position easy to find, understand and revisit. A saved position is a starting point for judgment, not proof that a particular agreement fits.

01 Capture the position and when it applies

Record the type of work, relevant locations and who is expected to carry the insurance. Keep each insurance product with its amount, currency and limit basis. Describe conditions, exceptions and any evidence the organization expects to receive.

02 Explain the reason

State what the position is intended to address in plain language. Identify the facts that could change the answer, such as sensitive data, physical work, professional advice or a shared policy limit. An unexplained number is harder to apply consistently.

03 Review before relying on it

An administrator can enter a position or use existing wording, documents or images. Check extracted conditions and exceptions. Policy information is a source for review; enter the proposed contract position separately. Save Draft keeps the positions and any reviewed policy excerpt. Approval is a separate administrator action.

04 Keep exceptions separate

When an agreement differs from the usual position, record the specific difference, business reason and authorized decision for that agreement. Accepting an exception does not change the standard or mean that missing insurance evidence has been supplied.

Choose where the work belongs

Use Company Standards in your organization workspace for saved positions. The separate Insurance Workbook page supports work in the current session: download ready files before refreshing or leaving. Check each download before sharing it with colleagues or an adviser.