MONTRIDGE INSURANCE SERVICES, INC.

Before You Accept the Assignment Worksheet

Use one copy for each assignment or material change. Keep with your internal job order.

Job order and location

Record client, site, dates, shift and job order reference.

Approved and excluded duties

List approved work and exclusions, including equipment or dock access.

Supervision and training

Name shift lead, backup and training owners, and confirm evidence.

Changes and escalation

Document changes and the authority to stop or release work.

Insurance and contract issues

List open questions about scope, classification or endorsements.

Decision and approval

Record approved, approved with changes or held, with owner and date.

Save a local copy. Keep completed records in your organization's approved system.