

Security training — evidence register

SAMPLE · FICTIONAL COMPANY

Meridian Dental Group — Sample Company · 12 employees · Training year 2026–27 · Maintained by Dana Reyes, Office Manager. This is the single index page the company hands its broker or attaches to the renewal questionnaire; every artifact below sits behind it in one folder.

REGISTER — 6 ITEMS · ILLUSTRATIVE DATES				
REF	ARTIFACT	DATE FILED	WHERE IT LIVES	STATUS
EV-01	Evidence register — this page; re-issued whenever an item below changes	Oct 16, 2026	Evidence Pack/00-register.pdf	✓ Current
EV-02	Security-awareness training policy — adopted in the company's name, signed by the managing partner	Oct 5, 2026	Evidence Pack/01-policy.pdf	✓ Adopted · review Oct 2027
EV-03	Completion log — all 12 employees against the module lineup, signed off by the administrator	Oct 16, 2026	Evidence Pack/02-completion-log.pdf	✓ 11 of 12 complete
EV-04	Certificates of completion† — one dated completion record per employee per finished module	Rolling	Evidence Pack/certificates/	✓ 79 records on file
EV-05	Admin rollout guide — the one-afternoon checklist the office manager ran	Oct 5, 2026	Evidence Pack/03-rollout-guide.pdf	✓ Rollout complete
EV-06	Training video library — 8–10 short modules, 3–5 minutes each, with quizzes (lineup below)	Sep 16, 2026	Evidence Pack/videos/(links)	✓ Delivered

MODULE LINEUP REFERENCED BY THIS REGISTER			
NO.	MODULE	NO.	MODULE
M1	Phishing & email scams	M5	Remote work security
M2	Passwords & MFA	M6	Incident reporting
M3	Social engineering	M7	AI-era scams & deepfakes
M4	Data handling & privacy	—	Final lineup is 8–10 modules at delivery

What this sample shows — and what exists today. This register illustrates the delivered state a company reaches after its one-afternoon rollout (dates above are illustrative, set after the September 16, 2026 delivery date). Today, one finished sample module exists — **M7, AI-era scams & deepfakes**, with its quiz; the full 8–10-module library and the live document templates deliver on September 16, 2026. Pre-orders are refundable in full any time before delivery.

Security-awareness training policy

SAMPLE · FICTIONAL COMPANY

Meridian Dental Group — Sample Company · Adopted October 5, 2026 (illustrative) · Filled from the pack's plain-English template in about ten minutes; the questionnaire sentence about having a training program is now true in writing.

1. Purpose

Meridian Dental Group trains every member of staff to recognize and respond to common security threats — phishing, social engineering, payment fraud, and AI-era scams — so that patient, financial, and business information stays protected.

2. Who this covers

All employees and long-term contractors, full-time and part-time, in every role: clinical, front desk, billing, and administration. New hires complete the training within 30 days of their start date.

3. The training program

- Short video modules (3–5 minutes each) covering phishing & email scams, passwords & MFA, social engineering, data handling & privacy, remote work security, incident reporting, and AI-era scams & deepfakes.
- Each module ends with a short quiz; a passing quiz creates a dated completion record for that employee.
- Every employee completes all assigned modules at least once every 12 months.

4. How completion is tracked

The office manager maintains the completion log and files each completion record in the evidence pack behind the evidence register. The log is reviewed for gaps at the end of each rollout window and before each insurance renewal.

5. Reporting security concerns

Anyone who suspects a scam, clicks a suspicious link, or receives an unusual payment request reports it to the office manager immediately. Reporting is always the right move: no employee will ever be penalized for reporting a concern or for taking two minutes to verify an unusual request before acting.

6. Review

This policy is reviewed annually — next review October 2027 — and whenever the practice's tools or team change materially.

Priya Nair

Dr. Priya Nair, Managing Partner — adopted October 5, 2026 (illustrative)

Dana Reyes

Dana Reyes, Office Manager — policy administrator

Training completion log

SAMPLE · FICTIONAL COMPANY

Meridian Dental Group — Sample Company · 12 employees · Modules M1–M7 (named lineup; final library is 8–10 modules) ·
Formatted to read cleanly next to a renewal application, not like a portal export. ✓ = quiz passed, completion record on file.

EMPLOYEE · ROLE	M1 PHISHING	M2 PASSWORDS	M3 SOC. ENG.	M4 DATA	M5 REMOTE	M6 INCIDENTS	M7 AI SCAMS	DONE
Priya Nair Managing Partner	✓ 10/06	✓ 10/06	✓ 10/07	✓ 10/08	✓ 10/09	✓ 10/09	✓ 10/07	7/7
Samuel Osei Associate Dentist	✓ 10/07	✓ 10/07	✓ 10/08	✓ 10/09	✓ 10/10	✓ 10/10	✓ 10/08	7/7
Alicia Trujillo Dental Hygienist	✓ 10/06	✓ 10/07	✓ 10/08	✓ 10/08	✓ 10/09	✓ 10/10	✓ 10/07	7/7
Marcus Webb Dental Hygienist	✓ 10/07	✓ 10/08	✓ 10/09	✓ 10/09	✓ 10/10	✓ 10/13	✓ 10/08	7/7
Jordan Ellis Front Desk Coordinator	✓ 10/06	✓ 10/06	✓ 10/07	✓ 10/08	✓ 10/08	✓ 10/09	✓ 10/08	7/7
Dana Reyes Office Manager · admin	✓ 10/06	✓ 10/06	✓ 10/06	✓ 10/07	✓ 10/07	✓ 10/08	✓ 10/06	7/7
Yuki Tanaka Dental Assistant	✓ 10/08	✓ 10/08	✓ 10/09	✓ 10/10	✓ 10/13	✓ 10/13	✓ 10/09	7/7
Robert Klein Dental Assistant	✓ 10/08	✓ 10/09	✓ 10/09	✓ 10/10	✓ 10/13	✓ 10/14	✓ 10/09	7/7
Fatima Al-Rashid Billing Specialist	✓ 10/06	✓ 10/07	✓ 10/07	✓ 10/08	✓ 10/09	✓ 10/09	✓ 10/07	7/7
Grace Okafor Insurance Coordinator	✓ 10/07	✓ 10/07	✓ 10/08	✓ 10/09	✓ 10/09	✓ 10/10	✓ 10/07	7/7
Tom Bradley Front Desk (part-time)	✓ 10/09	✓ 10/10	✓ 10/13	sched. 10/20	sched. 10/20	✓ 10/14	✓ 10/10	5/7
Elena Vasquez Practice Assistant	✓ 10/07	✓ 10/08	✓ 10/08	✓ 10/09	✓ 10/10	✓ 10/10	✓ 10/08	7/7

Status: 11 of 12 employees complete (79 of 84 records on file). Tom Bradley's remaining two modules are scheduled inside the rollout window; the log is re-issued when they close. All dates are illustrative, set after the September 16, 2026 delivery date. Today, one finished sample module exists (M7 — AI-era scams & deepfakes); the full library delivers September 16, 2026.

Dana Reyes

Signed — Dana Reyes, Office Manager (administrator) · October 16, 2026 (illustrative)

FILED BEHIND EV-01 · Evidence Pack/02-completion-log.pdf

SAMPLE · FICTIONAL COMPANY

CERTIFICATE OF COMPLETION†

Record of completed training

Security-awareness training program · Meridian Dental Group — Sample Company

Jordan Ellis

Front Desk Coordinator

completed the training module **“AI-Era Scams & Deepfakes”** (module M7, runtime 3:57) and passed its quiz with a score of **5 of 5**. A dated entry for this completion appears in the company's training completion log, filed behind evidence register item EV-03.

COMPLETED ON
October 8, 2026RECORD ID
CP-MDG-M7-005VALID FOR
12 months

† This certificate is a record of completion, not a certification. It documents that the named employee finished the named training module and passed its quiz. It is not a certification, accreditation, or endorsement by any insurer, auditor, or standards body.

Dana Reyes

Dana Reyes, Office Manager — program administrator

Coverproof

Generated from the completion log · Coverproof evidence pack

ON FILE
OCT 2026

The one-afternoon rollout, at a glance

SAMPLE · FICTIONAL COMPANY

Meridian Dental Group — Sample Company · Run by Dana Reyes, Office Manager, October 5–16, 2026 (illustrative). This overview condenses the full step-by-step guide in the pack: three steps for the admin, about 35 minutes total per employee, no logins to manage, no software to install.

STEP 1 · ~10 MIN

Adopt the policy

Put the company name on the training policy template, have the owner sign it, circulate it to staff. The questionnaire sentence about a training program is now true in writing.

STEP 2 · ~35 MIN / EMPLOYEE

Run the videos

Send the module links. Each is 3–5 minutes with a short quiz; people finish between patients. Spread it over any schedule — the log tracks who's done.

STEP 3 · ~30 MIN

File the evidence

Fill the completion log, generate the completion records, file everything behind the register. At renewal, attach — don't scramble.

THE ADMIN CHECKLIST — AS COMPLETED IN THIS SAMPLE

☒ Adopt & sign the policy — owner signature, date, circulate to all staff	OCT 5 · 10 MIN
☒ Announce the rollout — one email to the team: what, why, and the two-week window	OCT 5 · 5 MIN
☒ Send module links — everyone gets the same links; no accounts, no seats to provision	OCT 6 · 10 MIN
☒ Track completions weekly — tick the log as quiz confirmations arrive; nudge stragglers once	OCT 6–16 · 5 MIN/WK
☒ Generate completion records — one dated record per employee per finished module	OCT 16 · 10 MIN
☒ File the register — policy, log, records behind the one-page register; folder named and dated	OCT 16 · 5 MIN
☐ Before next renewal — re-issue the register, close any gaps, hand the single page to the broker	ANNUAL

What this illustrates. Dates show a fictional company's rollout after the pack's September 16, 2026 delivery. The full step-by-step guide (EV-05) ships with the pack; this page is the at-a-glance version an office manager actually pins up.