



Reception & Visitor Procedure Checklist

CM-SEC • UNCLASSIFIED • FOR PUBLIC USE

Business / Site Name: **Date:**

Address:

Assessor / Point of Contact: **Site Type:**

Notes (optional):

1) Reception Area Setup and Access Control

Focus: how the reception space is arranged to control movement and prevent tailgating or wandering.

- Reception has a clear line of sight to the primary entrance and any interior access doors.
Priority: H M L Status: OK Fix N/A
- Visitor flow is obvious and keeps guests in the lobby zone until the host arrives.
Priority: H M L Status: OK Fix N/A
- Door release buttons, access control panels, and badge stock are not visible or reachable from the public side.
Priority: H M L Status: OK Fix N/A
- Reception workstation auto-locks when unattended; screens are not readable from the lobby.
Priority: H M L Status: OK Fix N/A
- Emergency contacts are posted at the desk (Security, Facilities, IT/SOC, after-hours).
Priority: H M L Status: OK Fix N/A
- A discreet escalation method exists (duress code phrase / call script) and staff know it.
Priority: H M L Status: OK Fix N/A
- Secure disposal exists for visitor PII (locked shred bin or secure shred process).
Priority: H M L Status: OK Fix N/A

2) Visitor Intake and Verification

Focus: how identity and purpose are verified before any access is granted.

- Visitor is asked for full name, company/affiliation, host name, and purpose of visit before issuing a badge.
Priority: H M L Status: OK Fix N/A



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Photo ID is checked for all non-employees (or per site rule) and the photo is compared to the person.

Priority: H M L

Status: OK Fix N/A

Host is verified using an internal directory/contact method (not a number supplied by the visitor).

Priority: H M L

Status: OK Fix N/A

Unscheduled visitors are not granted access until host or Security confirms authorization.

Priority: H M L

Status: OK Fix N/A

Visitor log captures: name, company, host, purpose, badge number, check-in time, and destination.

Priority: H M L

Status: OK Fix N/A

Visitors are briefed: badge visible, no tailgating, remain with escort beyond the lobby.

Priority: H M L

Status: OK Fix N/A

3) Badge Issuance and Accountability Focus: how badges are issued, controlled, and recovered at departure.

Visitor badges are visually distinct from employee badges (color/label and large VISITOR marking).

Priority: H M L

Status: OK Fix N/A

Badges are non-transferable and worn visibly above the waist at all times.

Priority: H M L

Status: OK Fix N/A

Badges include date and host name (and access zone if applicable).

Priority: H M L

Status: OK Fix N/A

Lost badge procedure is known (notify Security immediately; re-verify identity before reissue).

Priority: H M L

Status: OK Fix N/A

Visitor check-out requires badge return and check-out time is recorded.

Priority: H M L

Status: OK Fix N/A

Any unreturned badge is documented and escalated to Security for follow-up.

Priority: H M L

Status: OK Fix N/A



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4) Escort and Movement Controls

Focus: where visitors may go and how escort discipline is maintained.

Host (or designated escort) meets the visitor at reception before entry beyond the lobby/public area.

Priority: H M L

Status: OK Fix N/A

Visitor is escorted at all times beyond reception (no unescorted hallway movement).

Priority: H M L

Status: OK Fix N/A

Visitors follow designated paths only (meeting rooms, approved restrooms, exit).

Priority: H M L

Status: OK Fix N/A

Visitors are not left alone near sensitive areas (badge printers, mailroom, IT closets, comm rooms).

Priority: H M L

Status: OK Fix N/A

If escort must leave, visitor returns to reception or waits in a controlled room (not in hallways).

Priority: H M L

Status: OK Fix N/A

Tailgating is actively prevented: one person, one credential; challenges are polite and consistent.

Priority: H M L

Status: OK Fix N/A

5) Contractors, Vendors, and Deliveries

Focus: how non-routine access is controlled when people arrive for work, service, or drop-offs.

Deliveries are received in a designated area; drivers do not roam interior hallways.

Priority: H M L

Status: OK Fix N/A

Contractors/vendors are verified against a work order or scheduled appointment before access.

Priority: H M L

Status: OK Fix N/A

Contractor scope and work locations are confirmed (no 'I was told to just go back there').

Priority: H M L

Status: OK Fix N/A

High-risk work (access control, cameras, ceilings/tiles, comm closets) receives oversight.

Priority: H M L

Status: OK Fix N/A



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Tools and materials remain under escort when moving through controlled areas.

Priority: H M L

Status: OK Fix N/A

After-hours work requires pre-authorization and check-in/out with Security or on-call contact.

Priority: H M L

Status: OK Fix N/A

6) Information Exposure Controls at Reception

Focus: preventing accidental exposure of sensitive information from the lobby area.

No passwords, door codes, alarm codes, floor plans, or security contacts are visible at the desk.

Priority: H M L

Status: OK Fix N/A

Visitor log and prior pages are not left open on the counter or visible to waiting visitors.

Priority: H M L

Status: OK Fix N/A

Printers/copiers near reception are configured to prevent unattended sensitive output.

Priority: H M L

Status: OK Fix N/A

Reception signage does not reveal internal security details (panel locations, codes, schedules).

Priority: H M L

Status: OK Fix N/A

Visitor Wi-Fi details are provided without exposing corporate network information.

Priority: H M L

Status: OK Fix N/A

7) Suspicious Behavior and Incident Handling

Focus: what to do when something feels off, and how to escalate cleanly.

If a visitor cannot name a host or purpose, a badge is not issued and Security/host is contacted.

Priority: H M L

Status: OK Fix N/A

If someone refuses ID or becomes aggressive, staff disengage and follow the escalation/duress procedure.

Priority: H M L

Status: OK Fix N/A

If tailgating occurs, staff notify Security and note description, direction of travel, and time.

Priority: H M L

Status: OK Fix N/A



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If a badge is found unattended, it is treated as a lost credential and reported to Security.

Priority: H M L

Status: OK Fix N/A

Urgent requests and executive name-drops are independently verified before access is granted.

Priority: H M L

Status: OK Fix N/A

8) After-Hours, Weekends, and Special Cases

Focus: controls for lower-staffed periods and special visitor categories.

After-hours visitors are allowed only with pre-approval and notification to Security/on-call contact.

Priority: H M L

Status: OK Fix N/A

Emergency responders/maintenance are verified (credentials plus dispatch confirmation with a known number).

Priority: H M L

Status: OK Fix N/A

Tours or interviews are controlled (visitor count tracked; escort discipline; restricted areas avoided).

Priority: H M L

Status: OK Fix N/A

Photography/video is restricted in controlled spaces; exceptions require authorization.

Priority: H M L

Status: OK Fix N/A

9) End-of-Day Closeout

Focus: making sure there are no loose ends or borrowed access left behind.

Visitor log is reconciled and all issued badges are accounted for.

Priority: H M L

Status: OK Fix N/A

Badge stock and access-related materials are secured/locked up.

Priority: H M L

Status: OK Fix N/A

Reception desk is cleared of visitor paperwork; sensitive notes are shredded or secured.

Priority: H M L

Status: OK Fix N/A

Workstations are signed out/locked; doors and lobby access points are confirmed secured.

Priority: H M L

Status: OK Fix N/A



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Any anomalies are documented and reported (unreturned badges, suspicious interactions, door issues).

Priority: H M L

Status: OK Fix N/A

10) Action Plan

Focus: capturing the top fixes and who owns them so improvements actually happen.

Top issue #1 identified and assigned an owner with a target date.

Priority: H M L

Status: OK Fix N/A

Top issue #2 identified and assigned an owner with a target date.

Priority: H M L

Status: OK Fix N/A

Top issue #3 identified and assigned an owner with a target date.

Priority: H M L

Status: OK Fix N/A

Follow-up date scheduled (recheck reception process after changes).

Priority: H M L

Status: OK Fix N/A

Notes / Evidence (optional):

Action plan: List the top issues you observed and what you'll do first.
