

### Before You Begin...

- Review [Eligibility and Processing Requirements](#) (PDF).
- For assistance in better understanding the automated Risk Management Credit form, you may want to review the [Credit Form Overview](#) section starting on page 3 of this document.

### Completing the Risk Management Credit Form

1. Log on to the [SafeChurch.com website](#).
2. On the site navigation bar, click the **Risk Mgmt Credit** tab.
  - The form is available only if the credit is available in your state. If the credit is not yet available in your state, please check back; or contact your agent for state availability target dates.
  - The form will only be available to you if you have logged on to the SafeChurch site, so make sure that you have registered and logged on.
  - The top of the form will fill in with the information you provided when you registered on the site.
3. Review the form to determine what assessments and/or training video modules (activities) you want to complete to earn the maximum policy premium credit you want for your church (up to the maximum allowed as reflected on the form).
4. Click the link for the activity you want to complete.  
For example, to complete the slips and falls assessment, click on the link that reads “Slips and Falls Assessment.”  
The page for that assessment or training module appears.
  - A. **Assessments:** If you selected an assessment link, answer each question for that assessment, clicking **Next** to advance. When you have completed the last question, click **Finish**.  
**Navigation Note:** If you need more help understanding or navigating assessments, please see the [Managing Assessments](#) (PDF) directions.
  - B. **Videos:** If you selected a training module, the training page appears.  
View the video and review any additional resources available to help you understand the topic better. When you are ready, click the **Take Test** link.  
  
**Navigation Note:** If you need more help understanding or navigating training modules, please see the [Viewing Training Modules and Taking Tests](#) (PDF) directions.
5. When you have finished the assessment or video activity, click the **Risk Mgmt Credit** tab again to return to the form.

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6. Repeat Steps 4 and 5 until you have earned the maximum percentage credit you want for your church, not to exceed the maximum allowed in your state for your premium level. Note the following points:
  - You may exit the form at any time and come back later to continue. Your information will be saved.
  - To print the form for your records at any time, click the **Print** button on the form.
  - When completing an assessment, if your church has multiple locations, the Risk Management Credit form will NOT show the credit on the form as completed, or the credit percentage earned, *until all locations have completed the assessment*.
7. Once you completed the activities to earn the total credit you want to earn, **your SafeChurch Church Administrator has two options for submitting the risk management form:**

**Important:** You can submit the credit form only once per policy year. Do not submit the form for processing until you have earned the maximum percentage credit you want for your church, not to exceed the maximum allowed in your state for your premium level.

  - A. **Online:** At the bottom of the form, the site administrator will read the applicable instruction for current or new customers: type his or her **Name** and **Title** in the fields provided, and then click the **Submit** button.

**Navigation Note:** A pop-up confirmation message should appear after clicking the **Submit** button. If it does not, your browser's pop-up blocker may be preventing the message from opening. Change your browser setting to allow pop-ups on the SafeChurch site, and then click the **Submit** button again.
  - B. **By mail:** At the bottom of the form, the site administrator will read the applicable instruction for current or new customers. At the top of the form, the administrator will click the **Print** button; sign and date the form, and return it to the church's agent or broker for processing.

## Credit Form Overview

A. There are four columns in the activities portion of the form (Left to Right), as shown in the image below:

- 1) a Risk Management category;
- 2) a check box with a list of links to activities to be completed to earn the credit;
- 3) the percentage of **Credit Available**; and
- 4) the percentage of **Credit Earned**

There is also a **Total Credit Requested** line at the bottom of the section.

		<u>Credit Available</u>	<u>Credit Earned</u>
<b>Starting a Safety Ministry</b>	<input type="checkbox"/> The following have been completed (NOTE: All 3 activities must be completed to qualify for the 6% credit)	6.0%	0%
	<ul style="list-style-type: none"> <li>• <a href="#">Safety and Security Team Assessment</a></li> <li>• <a href="#">Safety/Risk Management Program Assessment</a></li> <li>• <a href="#">Watch 16 minute training video and successfully complete a test</a></li> </ul>		
<b>Facility Safety</b>	<input type="checkbox"/> <a href="#">Slips and Falls Assessment</a>	2.0%	0%
	<input type="checkbox"/> <a href="#">Slips and Falls training video and successfully complete a test</a>	3.0%	0%
	<input type="checkbox"/> <a href="#">Water Damage Assessment</a>	3.0%	0%
	<input type="checkbox"/> <a href="#">Electrical Assessment</a>	2.0%	0%
	<input type="checkbox"/> <a href="#">Fire Safety training video and successfully complete a test</a>	3.0%	0%
<b>Children &amp; Youth Safety</b>	<input type="checkbox"/> <a href="#">Recreational Activities Assessment</a>	2.0%	0%
	<input type="checkbox"/> <a href="#">Playground Assessment</a>	2.0%	0%
	<input type="checkbox"/> <a href="#">Daycare/Nursery Assessment</a>	2.0%	0%
	<input type="checkbox"/> <a href="#">Daycare/Nursery training video and successfully complete a test</a>	2.0%	0%
<b>Additional Assessments</b>	<input type="checkbox"/> Five or More additional assessments* in any EFFECT category (NOTE: All 5 assessments must be completed to qualify for the 3% credit)	3.0%	0%
	<ul style="list-style-type: none"> <li>• <a href="#">Emergency Preparedness Assessment</a></li> <li>• <a href="#">Crime Prevention Assessment</a></li> <li>• <a href="#">Facility Use by Outside Groups Assessment</a></li> <li>• <a href="#">Choose another assessment to complete</a></li> <li>• <a href="#">Choose another assessment to complete</a></li> </ul>		
<b>Total Credit Requested (Max 15.0%)</b>			<b>0.0%</b>

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- B. When you first access the form, all items in the **Credit Earned** column are zero. When you complete the activities within each category, the system will enter a check in the appropriate checkbox, the **Credit Earned** column will fill in with the percent you have earned, and the total line will update.
  - C. Each time you complete a category and return to the form, you can see which items have been completed and quickly identify the total credit earned to date at the bottom of the form.
  - D. In some categories, you may complete activities for credit purposes *only if your church has that risk exposure*.

For example, under the **Children & Youth Safety** category, you can only earn the possible 2 percent credit by completing the "Playgrounds Assessment" *if your church has a playground*.

- E. When completing an assessment, if your church has multiple locations, the Risk Management Credit form will NOT show the credit on the form as completed, or the credit percentage earned, *until all locations have completed the assessment*.