

### 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 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 15 percent).
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 15 percent. Note the following points:
  - **Important: You can submit the credit form only once per policy year.** Do NOT click the **Submit** button or send the form by mail for processing until you have completed all the activities you want to earn the maximum credit available.
  - 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 maximum activities to earn the total credit you want to earn (cannot exceed the 15 percent available), your SafeChurch site administrator has two options for submitting the risk management form:
  - 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.
  - 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.

		<b>Credit Available</b>	<b>Credit Earned</b>	
<b>Starting a Safety Ministry</b>	<input checked="" type="checkbox"/> The following have been completed	6.0%	6.0%	
	<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>			
	<input type="checkbox"/> <a href="#">Slips and Falls Assessment</a>	2.0%	0%	
	<input checked="" type="checkbox"/> <a href="#">Slips and Falls training video and successfully complete a test</a>	3.0%	3.0%	
<b>Facility Safety</b>	<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="#">Recreational Activities Assessment</a>	2.0%	0%	
	<input type="checkbox"/> <a href="#">Playground Assessment</a>	2.0%	0%	
<b>Children &amp; Youth Safety</b>	<input checked="" type="checkbox"/> <a href="#">Daycare/Nursery Assessment</a> OR <a href="#">Daycare/Nursery training video and successfully complete a test</a>	2.0%	2.0%	
	<input type="checkbox"/> Five or More additional assessments* in any EFFECT category	3.0%	0%	
<b>Additional Assessments</b>	<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="#">Ladders Assessment</a></li> <li>• <a href="#">Food preparation/food safety Assessment</a></li> </ul>			
	<b>Total Credit Requested</b>		<b>Max 15%</b>	<b>11.0%</b>

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.

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- 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*.

The **Children & Youth Safety** category also offers an optional assessment or training video activity. If your church has as a Daycare/Nursery, you can earn the possible 2 percent credit by completing EITHER the Daycare/Nursery Assessment OR the Daycare/Nursery training video and successfully completing the test. You may choose to complete both activities, but the credit earned will not exceed 2 percent.

- 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*.