

# Liability Insurance Request Form:

The certificates are created at the Lockton (our broker) site by the requestor, using an interactive tool. The broker may become involved if there are special requests. The finished certificate is sent back in a digital copy, which can be printed and/or forwarded to the vendor.

Go to: [www.locktonportal.com/sites/rotary/resources](http://www.locktonportal.com/sites/rotary/resources)


Username: Rotarian

Password: Resources#1

Certificate of Insurance instructions are second from the top:

Partner Portal > Resources for U.S. Rotary Club & District Liability Insurance Program Welcome Rotary User | ?

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 Resources for U.S. Rotary Club & District Liability Insurance Program  
*For Rotarian Use Only* This Site [v] [m]

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**Shared Files**

- Loss Control
- General Information
- General Liability Insurance
- Directors' & Officers' / Employment Practices Liability Insurance
- Rotary Forms

**Rotary Forms**

Type	Name
	2014-15 U.S. Rotary Club and District General Liability Certificate of Insurance
	Certificate of Insurance Instructions (right-click to open in new window)
	Incident Report Form
	Incident Handling Guidelines

**Loss Control**

Type	Name
	Loss Control - Use of Fireworks
	Loss Control - Use of Automobiles
	Contract Best Practices for Activities and Events
	Loss Control - Financial Risk Management
	Use of Rotary Name and Emblem
	Loss Control - Use of Watercraft and Water Activities
	Loss Control - Use of Waiver and Release Forms
	Loss Control - Use of Golf Carts and other Mobile Equipment
	Loss Control - Serving Alcohol at Events
	Loss Control - Indemnification Hold Harmless Language in Contracts
	Loss Control - Food Handling and Serving
	Loss Control - Construction Projects
	Loss Control - Athletic Events and Activities
	Loss Control - Management of Swimming Pools

**General Information**

Type	Name	Modified By
	Insurance Program Overview	Scott Meise
	FAQ - Common Insurance Concerns	Scott Meise

**Resource Announcements**

**IMPORTANT CHANGE TO FIREWORKS COVERAGE!** 7/23/2014 10:16 AM  
by Joy Campbell  
Coverage is being discontinued for fireworks events where Rotary Clubs sign a contract with a pyrotechnic/fireworks company. For more information and FAQs, please click on the announcement.

**Check out our webinar recording (1 hr) for an overview on the insurance program!** 3/12/2014 10:53 AM  
by Scott Meise  
If you click on the link below, you are able to view our one-hour webinar that provides an overview of the U.S. Rotary Club and District Liability Insurance Program.  
<http://vimeo.com/88805124>

**ALERT! VERY IMPORTANT INFO RE: USER NAME & PASSWORD!** 3/11/2013 3:37 PM  
by Andrea Patka  
Due to the institution of a new security protocol, if the user name or password are entered incorrectly **5 times in a row** the Lockton Partner Portal will be locked down for **30** minutes.  
Please be **VERY CAREFUL** when you enter the user name and password...

**Contacts:**  
1-800-921-3172  
[rotary@lockton.com](mailto:rotary@lockton.com)

Click on Certificate of Insurance Instructions (right click to open in a new window).

This will bring up the certificate with information blocks as to how to fill in the form:

### Certificate of Insurance Instructions

To open the form: From the Rotary Portal home screen, select “201x-1x US Rotary Club and District General Liability Certificate of Insurance.”

The form is an ACORD Certificate of Liability Insurance. It includes sections for PRODUCER (Lockton Companies, LLC), INSURED (All Active US Rotary Clubs & Districts), COVERAGES (General Liability, Automobile Liability, Umbrella, Workers Compensation), and CERTIFICATE HOLDER. A 'Submit Form' button is in the top right. Five numbered instructions are overlaid on the form:

1. Enter today's Date. (points to the date field)
2. Enter: Certificate Holder name and address - the party requesting the proof of insurance  
Rotary Club Name and/or District Number  
Event Description – Event Name and date(s) (points to the certificate holder information)
3. Click “Submit Form” to create certificate. Note: You will get no reply unless the certificate was completed incorrectly. (points to the Submit Form button)
4. Select “Print” from your tool bar or “Save As:” to save to your computer. (points to the print/save area)
5. Save a copy for your records. (points to the bottom of the form)

Additional callouts include: 'Additional-insured wording is standard.' (pointing to the insured description) and 'E' (pointing to the date field).

Then just click on "Submit Form", as the instructions direct, and the form will be sent to you.