

Ohio Association of Health Underwriters Policy and Procedures

POLICY TITLE:	CareWorks Reimbursement Policy
CLASSIFICATION:	Board / Finance
POLICY NUMBER:	2015-0101
MOTION:	Sam Fiorentino
SECONDED:	Debbie Boop
DATE SUBMITTED (INITIAL):	January 15, 2015
DATE APPROVED:	January 15, 2015
SUNSET DATE:	January 2017
SEND TO COMMITTEE:	December 2015
MOTION TO UPDATE:	Sandra Moody Gresham
SECONDED:	Dave Kross
DATE SUBMITTED (INITIAL):	August 11, 2016
DATE APPROVED:	August 11, 2016
SUNSET DATE:	August 2018
SEND TO COMMITTEE:	July 2018
MOTION TO RENEW 3/12/19	Carol Conway
SECONDED:	Ingrid Martin
SUNSET DATE:	March 2021
MOTION TO UPDATE 3/25/20	Jennifer Kaufman
SECONDED:	Kelly Belote
SUNSET DATE:	March 2023

Purpose: Distribution of CareWorks Reimbursement

OAHU will allocate additional funds from the annual reimbursement check from CAREWORKS to local chapters and then let local chapters reimburse their members for early bird registrations, travel, hotel costs, etc. for attending CAP conference, NAHU Convention and Region III meetings. (In the past OAHU reimbursed the chapters for these items according to expense reimbursement policies).

OAHU will provide a check to all local chapters within 60 days of receipt of the CareWorks check. If the database has not been provided to OAHU from CareWorks that determines the distribution, the checks will be based off the previous years totals and then adjusted once actual check is received.

If we have to send a check based on the previous year's amount and the actual amount of the check ends up being less than the previous year, OAHU will not take that extra money back. If the amount due ends up being more, the locals will receive an extra check with the difference*. SEE BELOW*

Local Chapters are strongly encouraged to make arrangements for their members to attend CAP Conference, Region III meetings and NAHU Convention.

Policy: Formula for CAREWORKS Distribution:

We will take the approved annual budgeted amount of income for OAHU and the budgeted expense for the locals' portion and divide them by number of groups sold by agents to reach the percentage of the check that the locals will receive. The CareWorks check will be deposited into OAHU's checking account with the calculated amount (per number of agents sold) available for distribution to the locals. The total groups sold by agents will be determined according to the detailed reporting from CareWorks. This is not a guarantee of income to any party.

*If CareWorks check does not equal the budgeted amount (for example, OAHU has budgeted \$25,000, but based on number of groups sold by the agent the check is \$30,000). OAHU will divide the additional amount based on the number of delegates for each local.

USING CAHU AS AN EXAMPLE:

OAHU Voting delegates determined for the 2018 elections, the state had a total of 17 delegates and CAHU represented 4 of those delegates. (These are the state delegates not delegates used for NAHU symposium). For each delegate, the local will receive 1/17 of the additional funds (this could change based on delegates each year). Take \$3844.64 divided by 17 total delegates for OAHU = \$226.19 times (number of delegate that CAHU has 4) to calculate CAHU's additional amount of \$904.62.

*Delegate count may change year to year.

Financial Impact will be determined annually at Budget Meeting.