

**OHIO ASSOCIATION OF HEALTH UNDERWRITERS
POLICY AND PROCEDURE**

POLICY TITLE: CE Offering
CLASSIFICATION: Education
POLICY NUMBER: 2008-1202
MOTION: Bob Quirk
SECONDED: Randy Klein
DATE SUBMITTED (INITIAL): December 18, 2008
DATE APPROVED: December 18, 2008
APPROVED BY: Board of Directors

RENEWED: November 18, 2010
MOTION: John Woods
SECONDED: Steve Brubaker
APPROVED BY: Board of Directors

RENEWED: October 18, 2012
MOTION: Randy Klein
SECONDED: Sam Fiorentino
APPROVED BY: Board of Directors
SUNSET DATE: November 2014

RENEWED: September 2014
MOTION: Sam Fiorentino
SECONDED: Debbie Boop
APPROVED BY: Board of Directors
SUNSET DATE: November 2016

RENEWED: September 2016
MOTION: Lee Nathans
SECONDED: Carol Conway
APPROVED BY: Board of Directors
SUNSET DATE: November 2018

MOTION TO RENEW 3/12/19
SECONDED: Carol Conway
SUNSET DATE: Ingrid Martin
March 2023

Policy:

OAHU proposes expanding the offering of OAHU filed CE's to groups of agents or non-agents outside of the OAHU membership. In line with our NAHU goal to educate America, any OAHU member in good standing may offer an OAHU CE to a group of

agents following the procedure as outlined below. The course presenter will pay for the fees accompanying the CE's offered. Failure to follow the procedure indicated will result in that member not being able to offer CE's in the future.

Procedure:

1. OAHU course dates/places must be filed by OAHU no later than 30 days prior to meeting. The instructor's credentials should be verified by OAHU Admin and/or the OAHU CE Chair before approval of a rental request.
2. A description of the meeting format, location, and timeframe including break times must be a part of a rental request. (Course outlines should be available to member renting course for proper format submission to OAHU)
3. OAHU Course Roster filings must also be filed by OAHU. This can be submitted to OAHU admin electronically or paper format (NPN # and names must be typed). The member renting should have attendees complete the Ohio Insurance continuing Education Course Roster Sign in Sheet provided by OAHU, and fax/mail /email to the OAHU office. A check payable to OAHU for rental in the amount of \$3.00 per credit hour, per attendee should also be included. The member renting the course must also agree to be responsible for obtaining NPN numbers for submission and also follow up with attendees in the event of a rejected NPN by ODI, Ohio Department of Insurance. This would also include any "late" attempts by attendees left off of initial roster submissions.
4. Any advertising/announcement of an OAHU course by the member must be approved by the designated OAHU board member.