

Ohio Association of Health Underwriters Policy and Procedures

POLICY TITLE: Local Chapter expense reimbursement policy
CLASSIFICATION: Board/Finance
POLICY NUMBER: 2010/1101
DATE SUBMITTED (INITIAL): 11/18/2010
DATE APPROVED: 11/18/2010
MOTION: Chris Heiberger
SECONDED: Steve Brubaker
APPROVED: Board

RENEWED: November 2012
MOTION: Dave Kross
SECONDED: Sam Fiorentino
APPROVED BY: Board of Directors

RENEWED: September 2014
MOTION: Sam Fiorentino
SECONDED: Larry Link
APPROVED BY: Board of Directors
SUNSET DATE: September 2016
SEND TO COMMITTEE: August 2016

RENEWED: September 2016
MOTION: Lee Nathans
SECONDED: Dave Kross
APPROVED BY: Board of Directors
SUNSET DATE: September 2018
SEND TO COMMITTEE: August 2018

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

Purpose: To define the policies for reimbursement of expenses by members of the local chapters of OAHU who incur expenses in the valid course of representing their local chapters of OAHU. Reimbursement will be determined by the OAHU board. Each local chapter member is reminded that OAHU's image can be best served by the use of restraint rather than extravagance in spending the Association's (and therefore the members') money.

Policy:

1. All expense requests must be submitted within 60 days of event, using the standard OAHU expense Reimbursement Form must include dates and business purpose of all travel.

2. Itemized receipts are required for all registration expenses.
 - a. **The method of payment.** When paid in cash, the receipt must indicate "cash." When paid by check, include the check number, the date of the check, and the name of the bank the check was drawn on. If a credit card was used, the original vendor receipt indicating "credit card/Visa/MC/etc." must be provided. Personal credit card receipts or statements are not considered an acceptable receipt.

3. **Duties of the Local Association**
 - a. The Local Association must be knowledgeable and familiar with OAHU Expense Reimbursement Policy.
 - b. The affected local individual will be given a copy of the OAHU Reimbursement policy so that requests for reimbursement will be made in accord with this OAHU policy. Reimbursement policy can be found on the ohioahu.org website.
 - c. The Local Association must gather all Expense Reimbursement forms and receipts from attendees and review, approve if appropriate and submit them to OAHU for reimbursement of the approved expenses: (checks payable to Local not individuals).
 - d. The Local Association is responsible to ensure the presence of their members at the venue and appropriate functions for reimbursement to occur.

4. **Expense Submission Review.** The OAHU President and Secretary / Treasurer will be responsible for implementation and administration of this policy. Any questionable expense will be reviewed by the OAHU Executive Committee for determination of approval.

Financial Impact will be determined annually at the budget meeting