

Oklahoma State Association of Health Underwriters Policy & Procedures

Policy Title: Archive Policy

Classification: Administrative

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Date Submitted: June 18, 2002

Date Approved: November 19, 2002

Purpose: The P&P of information are to insure all data of the Oklahoma State Association of Health Underwriters is available and secure to meet all Federal & State Laws.

Retention: Files & Data will be maintained for a minimum of seven years.

Included: The following will be maintained for all local chapters.

- A. Charters
- B. Bylaws
- C. Annual Budgets
- D. All treasurer reports
- E. All board meetings minutes
- F. Financial reports from all fund raisers
- G. Newsletters
- H. Policy and Procedures Manual
- I. Fund raiser supplies if available (Sponsor signs)
- J. Other as directed by board of directors

Separation: Each chapter (State, or Local) will have separate storage facility within the principal storage location.

Cost: Each chapter (State or Local) is responsible for an equal share of the storage location.

Location: The location of the principal storage facility will be convenient to all participants.

Participants: All member chapters of the Oklahoma Assoc. of Health Underwriters.

Access: Each participating chapter will have two (2)-designated members by each participating association with key access to the storage facility.