



Oklahoma State Association of Health Underwriters (OSAHU)

Policy & Procedure

Policy Title: Archive Policy
Classification: Administrative
Policy Number: PP-005
Motion:
Seconded:
Dated Submitted: June 18, 2002
Dated Approved: November 19, 2002
Amended: January 20, 2009
Sunset: 2012

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.

POLICY: Files and Data will be maintained for a minimum of seven years.

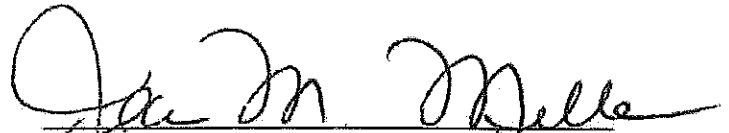
PROCEDURE(S):

1. The following will be maintained for all chapters:
 - A. Charters
 - B. Bylaws
 - C. Annual Budgets
 - D. All treasurer reports
 - E. All board meeting 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
 - K. Audits and Tax Filings.
2. Separation: Each chapter (State, or Local) will have separate box(es) for their specific information clearly labeled.
3. Cost: The State Association is responsible for the cost of the business record storage charges annually.
4. Location: The location of the principal storage facility will be accessible to all participants.

5. Participants: All member chapters of the Oklahoma Association of Health Underwriters.
6. Access: Each participating chapter will have two (2) designated members by each participating association with access to the facility.
7. Iron Mountain business record storage. 11300 Partnership Dr Suite D Oklahoma City, OK 73131 (405) 272-9815 www.ironmountain.com



President



Secretary