

**CALIFORNIA ASSOCIATION OF HEALTH UNDERWRITERS
POLICY & PROCEDURES**

POLICY TITLE: Routing of New Membership Applications

CLASSIFICATION: Membership

POLICY NUMBER: 4002

COORDINATOR: VP of Membership

MOTION:

SECONDED:

DATE SUBMITTED (INITIAL):

DATE APPROVED: August 17, 2015

APPROVED BY: Board of Directors

AMENDED:

REVIEW: 2017

PURPOSE: To provide Chapters with immediate information about new members, allowing them to contact and welcome these members quickly and to adhere to NAHU's current policy and procedures regarding new membership applications.

POLICY: Any CAHU chapter that wishes may prepare its applications or design its members recruitment efforts to forward new member applications to its headquarters for entry into its database before these applications are sent to NAHU for entry into the national membership database.

Submission of applications to CAHU/NAHU must be made in a timely manner, and all original documentation must be included. Chapters are not required to collect applications as they can be submitted directly to CAHU or NAHU by the new member or made submitted online directly with NAHU.

The policy applies only to new membership applications. Membership renewals will continue to be processed by NAHU exclusively.

PROCEDURE(S):

1. Chapters may collect new member applications for the purpose of gathering information about their new members more quickly.

2. Originals or faxed copies if paying due by CC or bank draft of all documentation including application and check/credit card/bank draft payment for all health underwriter dues collected, must be forwarded to NAHU within ten (10) business days of receipt by chapter.

a) Lag of submission to NAHU will be measured by either the chapter's date stamp or the date written on the member's dues check. If a chapter exceeds the submission deadline of ten (10) business days, NAHU will notify the chapter president. If delays continue, the state president and Regional Vice President will be notified. If, after a reasonable time for procedures to be corrected, such delays continue, NAHU, with approval by the RVP may suspend the chapter's right to collect applications.

III. Applications received by NAHU from chapters using this procedure will be added to NAHU database in the same manner that all applications are received. Members' join and expiration dates will be determined by the date applications are received in NAHU office. State and local portion of dues will be disbursed by NAHU, following currently established procedures.

IV. Despite chapters' addition of members to their database, no new applicant will be an officially active member of NAHU/CAHU or the local chapter until their application has been processed and APPROVED BY NAHU. All membership counts for dues remittance. House of Delegate representation, or other purposes, will be determined by the official NAHU membership database.

FINANCIAL IMPACT:

Expense of contracted Membership Administrator to execute these procedures and communicate to chapters and new member applicants status or troubleshoot applications received then forward on to NAHU and coordination with NAHU Staff.