

**NATIONAL ASSOCIATION OF HEALTH UNIT COORDINATORS, INC.**



# **NAHUC**

# **Policies**

**Developed and Reviewed by: The NAHUC Board of Directors**  
**Version: March 2023**

## **NAHUC Mission**

**The National Association of Health Unit Coordinators, Inc., is dedicated to promoting health unit coordinating as a profession through education and certification, complying with the NAHUC Standards of Practice, Standards of Education and Code of Ethics**

## **NAHUC Vision**

**To become nationally recognized as the standard of excellence in the provision of education and certification for the health unit coordinator profession within the health care industry**

## **NAHUC Core Values**

**◆Membership ◆ Education ◆ Certification ◆ Stewardship**

**National Association of Health Unit Coordinators, Inc. (NAHUC)**  
**PO Box 1898**  
**Rockford, IL 61110-0398**  
**815-633-4351**  
**office@nahuc.org**  
**www.nahuc.org**

No duplication is permitted in any way without the written consent of NAHUC.

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## **POLICY 101: NAHUC Logo**

**PURPOSE:** To give description of the NAHUC Logo, and state NAHUC Board’s authorization rights regarding changes.

**PROCEDURE:**

- A. The NAHUC Logo is Kelly Green on a White background. Gold may be used on the lettering.
- B. The NAHUC Board in its sole discretion retains its right to authorize changes in the color of the NAHUC logo.



<p>Approved: January 25, 1981 Revised: February 4, 1989 Retired: February 4, 1989 Re-instated: July 26, 1994 Revised: Reviewed: Mar 4,2016; July 30, 2018, April 1, 2020; Mar 25, 2022</p>	
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## **POLICY 102: USE OF THE NAHUC NAME AND/OR LOGO**

**PURPOSE:** To allow the opportunity to use the NAHUC name and/or Logo. In order to promote a professional image of health unit coordinating, permission to use the NAHUC name and/or Logo is granted by NAHUC with the approval of the NAHUC President or designee.

**PROCEDURE:**

**A. Permission**

1. Only NAHUC members and other interested parties may request permission to use the NAHUC name and/or logo.
2. The requestor will submit a “Permission Request for Use of the NAHUC Name and/or Logo” form to the NAHUC Office. The requestor will be notified within three (3) weeks of the decision.
3. Permission will be granted for a specific requested amount of the item to be produced. If additional items are needed, then second request must be submitted.
4. The approved “Permission Request” will be effective for one (1) year from the date that permission was granted.
5. When selling items with the NAHUC Name and/or Logo, the approved “Permission Request” must be displayed.
6. The selling of items with the NAHUC Name and/or Logo that have not been approved for sale could result in the possible loss of NAHUC affiliation and/or possible legal action.

**B. Use**

1. The NAHUC Name and/or Logo may only be used as approved.
2. The NAHUC Name and/or Logo may only be used on stationery items, i.e. letterhead and envelopes for official NAHUC business by the NAHUC Board of Directors, Subsidiary Boards, or NAHUC Committees.
3. Fund raising items that are unprofessional towards health unit coordinating, or that contain slogans or graphics containing objectionable language or images will not be approved.

Approved: February 1988 Revised: Feb. 4, 1989; Feb 8, 1992; Feb 9, 1997; Feb 4, 2001; Feb 16, 2007; Feb 20, 2014, Mar 3, 2017; Reviewed: July 30, 2018, April 1, 2020; Mar 25, 2022	
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## **POLICY 103: NAHUC MEMBERSHIP CONTACT INFORMATION**

**PURPOSE:** To ensure privacy and availability of NAHUC Membership information.

**PROCEDURE:**

- A. Lists of NAHUC members may be obtained by members by submitting the Mailing List Request Form to the NAHUC Office. The Office at no charge can send the list electronically.
- B. Those members who have requested that their contact information not be published will be excluded from the list. All other members' names, addresses, telephone numbers, and e-mail addresses will be listed.
- C. The following disclaimer will appear on any request form for membership contact information:

I agree to use the list or labels only for educational or research purposes as listed above. I agree that I will not make, sell, use, re-use, reproduce, make available to others, distribute, disclose or otherwise utilize the mailing list or information contained therein. I indemnify the NAHUC Board of Directors from any liability arising out of the activities for which the list was used.

Approved: June 18, 1985 Revised: July 1986; Feb 4, 1989; Jul 17, 1990; Feb 8, 1992; Feb 7, 1997; Feb 14, 2003; Aug 7, 2007; Feb 20, 2014; Jul 31, 2017; July 30, 2018  Reviewed: Mar 4, 2016; April 1, 2020; Mar 25, 2022	
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## **POLICY 104: NAHUC PROFESSIONAL DEVELOPMENT FUND**

**PURPOSE:** To provide an award(s) to a successful health unit coordinator certification exam candidate(s) selected annually by the NAHUC Education Board. Open to all NAHUC members who have successfully passed the NAHUC Certification exam and submit the application within twelve months of passing.

**PROCEDURE:**

- A. The goal is to award up to two recipients annually the amount of the member rate for exam registration depending on the amount in the NAHUC Professional Development Fund.
- B. All applications must be submitted to the NAHUC Office and postmarked by December 31 of the current year and within twelve months of successfully passing the exam. The NAHUC Office will forward the information to the NAHUC Education Board and applications will be reviewed annually during January of the following year. At that time, up to two recipients will be selected randomly.
- C. NAHUC will notify the applicant(s) of the decision in February and announce the winner(s) in the April-June issue of *“the Coordinator.”*
- D. The Board of Directors, in its discretion, can terminate the fund and use the funds for other worthwhile purposes.

Approved: June 5, 2000 Revised: Feb 16, 2007; Feb 20, 2014; Mar 15, 2018; April 1, 2020, April 20, 2020, January 27, 2023 Reviewed: Mar 4, 2016; July 30, 2018; Mar 25, 2022	
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## **POLICY 105: NAHUC BUCKS**

**PURPOSE:** To establish guidelines on how NAHUC Bucks are obtained and used.

**PROCEDURE:**

- A. NAHUC Bucks are vouchers that may be used in place of money towards the purchase of certain NAHUC services and merchandise. Each is worth \$5.00 (U.S. dollars) and expires 1 year after issue date.
- B. Ways to Obtain NAHUC Bucks
  1. Recruitment of New Members
    - a. NAHUC member's name must be listed on a new member's membership application in the "Referred by:" line BEFORE the application is received by the NAHUC Office.
    - b. Once a membership application and dues are received with the referring member's name on it, the referring member will be sent one NAHUC Buck worth \$5.00 (U.S. Dollars).
  2. Purchase
    - a. NAHUC Bucks may be purchased from the NAHUC Office at the face value of \$5.00 (U.S. Dollars).
  3. Limits
    - a. A NAHUC Member may receive up to six (6) NAHUC Bucks per fiscal year from the referral of new members.
    - b. Photocopies and reproductions of NAHUC Bucks will not be honored.
    - c. NAHUC Bucks will not be issued for student member referrals.
- C. Usage of NAHUC Bucks
  1. NAHUC Bucks may be used for:
    - a. NAHUC Membership renewal
    - b. Advertised NAHUC publications and products
    - c. NAHUC Conference Pins and other merchandise sold by NAHUC.
    - d. Payment for Web Site Contact Hours
    - e. NAHUC sponsored conferences and workshops
  2. NAHUC Bucks may not be used for:
    - a. Certification/Recertification
    - b. Certification products, pins, patches
    - c. Certification Board Job Analysis
    - d. Conference Chapter Table Fees



D. Redemption of NAHUC Bucks

1. To redeem, a member sends in the NAHUC Buck voucher(s) with a NAHUC membership renewal form or order form for NAHUC merchandise in substitution for \$5.00 of the dollar amount due. Multiple vouchers may be redeemed at the same time.

Approved: February 13, 2003 Revised: Feb 20, 2014; Mar 4, 2016; July 30, 2018 Reviewed: April 1, 2020; Mar 25, 2022	
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## **POLICY 106: NAHUC MEMBERSHIP DUES**

**PURPOSE:** To establish costs of membership dues.

**PROCEDURE:**

- A. Membership Dues:
  - 1. New membership dues are \$45 per year.
  - 2. Renewal membership dues are \$40 per year or \$95 for a 3-year renewal.
  - 3. New student membership dues are \$30 for first year.
  
- B. All former Presidents, prior to May 1, 2019, having served a full term and maintained good standing were granted a lifetime membership.

Approved: June 12, 1984 Revised: Feb 4, 1989; Feb 9, 1991; Jun 8, 2004; Feb 20, 2014; Jul 31, 2017; July 30, 2018 Reviewed: Mar 4, 2016; April 1, 2020; Mar 25, 2022	
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## **POLICY 107: NAHUC MEMBERSHIP PINS**

**PURPOSE:** NAHUC membership pins are available to the membership.

**PROCEDURE:**

- A. New members will receive a NAHUC membership pin at no charge with their welcome package.
- B. Active NAHUC members in good standing may order a replacement membership pin for a donation as set by the NAHUC Board.

Approved: Revised: Feb 1989; Feb 6, 1997; Feb 4, 2001; Retired: February 2014 Reinstated: March 4, 2016 Revised: Reviewed: July 30, 2018, April 1, 2020; Mar 25, 2022	
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## **POLICY 108: NAHUC DOCUMENT RETENTION AND DESTRUCTION**

**PURPOSE:** For the proper maintenance, filing and security of NAHUC records. This is the responsibility of each Board Member, Committee Chair, and Chapter Officer.

**PROCEDURE:**

- A. All records, including those maintained on electronic data processing storage media, shall be covered by this policy.
- B. Documents of historical significance will be maintained by the association.

Type of Record	Retention Period:
<b>ACCOUNTING/BANK RECORDS</b>	
Bank statements, reconciliations	2 years
Canceled checks	7 years
Charts of accounts	Permanently
Financial statements (annual)	Permanently
General Ledger A General Ledger is the complete record of a company's financial transactions. The GL is used in order to prepare all of the Financial Statements.	Permanently
Superseded check signature authorizations	3 years
Invoices / Requests for payments	7 years
<b>CORPORATE RECORDS</b>	
Annual reports	Permanently
Articles of Incorporation	Permanently
Bylaws	Permanently
Application for Recognition of Exemption, including related correspondence and determination letter	Permanently
Minutes and resolutions (Board and Committees of the Board authority)	Permanently

Type of Record	Retention Period:
Policies and procedures	For life of policy/procedure
Conflict of Interest Forms	2 years
<b>CONTRACTS</b>	
Contracts (expired)	7 years
<b>INSURANCE</b>	
Insurance Policies (expired)	3 years
<b>MEMBERSHIP</b>	
Correspondence (legal and important matters only)	Permanently
Ethics and disciplinary action files - Files in which action was taken	1 year
Ethics and disciplinary action files - Files closed without action	30 days
<b>TAXES</b>	
Tax returns	Permanent

<p>Approved: February 10, 2000, April 2, 2020</p> <p>Revised: Mar 1, 2012; Feb 20, 2014; Mar 4, 2016; April 2, 2020</p> <p>Reviewed: July 30, 2018; Mar 25, 2022</p>	
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## **POLICY 109: SURVEYS**

**PURPOSE:** To define the procedures to be used when requests are made to survey the NAHUC membership or attendees at NAHUC events.

**PROCEDURE:**

- A. Applicants must submit the completed Survey Request Form to NAHUC office via email.
- B. The NAHUC Board of Directors will review the survey application and provide a response to the applicant within 30 days of the date the proposal was received. The NAHUC Board of Directors will review the application based on the following questions:
  - 1. Is the purpose of the survey clear and is it explained to the perspective participants?
  - 2. Is the survey well-designed and of an appropriate length? Does it follow sound survey methods and practices? Are the questions easily understood and interpreted?
  - 3. What is the target population? Will the entire population or a sample be surveyed?
  - 4. Are the rights of perspective participants clearly explained?
  - 5. What actions are being taken to ensure the confidentiality of the responses?
  - 6. When will the survey be conducted? What is the optimal timing to ensure it does not compete with other surveys and activities?
  - 7. How will the results be used?
  - 8. How will the findings be disseminated? Who will have access to the information and will it help them make better decisions as a result?
  - 9. Can the proposed survey be combined with other planned surveys?
  - 10. Are there other data available that will allow the survey to be avoided?
- C. NAHUC Office will provide feedback to the applicant, either approval of the survey project as is or a change notice with feedback regarding specific changes needed. The use of mass e-mailing lists to promote or distribute a survey to NAHUC membership is limited to official surveys approved by the NAHUC Board of Directors.

Approved: March 16, 2018	
Revised:	
Reviewed: April 1, 2020; Mar 25, 2022	

## **POLICY 201: LEGAL COUNSEL**

**PURPOSE:** To provide legal advice to the National Association of Health Unit Coordinators.

**PROCEDURE:**

- A. With Board approval, the President of NAHUC may select competent legal counsel.
- B. Contract Review: See Policy 1304

Approved: February 3, 1984 Revised: Feb 4, 1989; Feb 5, 1998; Aug 2, 2011; Aug 2, 2014; Aug 29, 2016; Reviewed: July 31, 2018; Sept 24, 2020, Aug 16, 2022	
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## **POLICY 301: REVIEW OF EXISTING POLICIES**

**PURPOSE:** To ensure that policies are current, policies will be reviewed by the Board of Directors (BOD) on a consistent, rotating schedule. The schedule is based on a two (2) year cycle.

**PROCEDURE:**

<u>TIME ASSIGNED</u>	<u>POLICY SECTION</u>
Even year Winter BOD	100
	500
	800
	1200
	1500
	1700
Even year Summer BOD	200
	300
	400
	600
	1300
Odd year Winter BOD	900
	1100
	1400
Odd year Summer BOD	700
	1000
	1800

<p>Approved: February 1996</p> <p>Revised: Feb 10, 2000; Feb 20, 2004; Feb 20, 2014; Mar 20, 2015; Aug 29, 2016; Jul 31, 2017; July 31, 2018</p> <p>Reviewed: Aug 4, 2014; Sept 24, 2020, August 16, 2022</p>	
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## **POLICY 401: RESOLUTIONS**

**PURPOSE:** Guidelines for NAHUC members wishing to add items to the Annual Business Meeting agenda.

**PROCEDURE:**

- A. The resolution must be in writing and must be submitted to the President and Secretary/Treasurer 24 hours prior to the Annual Business Meeting in order to be considered.
- B. Resolutions that conflict with NAHUC’s Articles of Incorporation and Bylaws, National and State laws are automatically null and void.
- C. In general, the subject matter of a resolution must have something to do with the business of the Association, its relationship to governments and/or other associations, or issues pertinent to members of NAHUC.
- D. Any resolution must be in the following format:
  - 1. Preamble-stating the issue and the position.
  - 2. Resolve-stating what is to be done.

<p>Approved:</p> <p>Revised: Feb 4, 1989; Feb 7, 1993; Feb 13, 2003; Aug 27, 2012; Aug 4, 2014; Aug 29, 2016; Mar 25, 2022</p> <p>Reviewed: July 31, 2018; Sept 24, 2020, August 16, 2022</p>	
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# **POLICY 402: NAHUC BOARD OF DIRECTORS MINUTE TAKING GUIDELINES**

**PURPOSE:** To have continuity of minute taking and clarification of what and how various items should be included in the minutes.

**PROCEDURE:**

**A. Motions:**

1. The standard statement for each motion should say: Upon a motion duly made by \_\_\_\_\_ and seconded by \_\_\_\_\_, the Board of Directors, after discussion, decided to: \_\_\_\_\_. The motion:
  - a. passed unanimously: \_\_\_\_\_
  - b. with a vote of Yes: \_\_\_\_\_ No: \_\_\_\_\_ Abstentions: \_\_\_\_\_  
(list who and why they abstained.)
2. If the Board wishes any issue to be included in the minutes, it must be in the form of a motion.
3. If a motion is not passed, it is still included in the minutes.
4. Reports need to be accepted as a motion. The reports will be added to the minutes in the form of an attachment.
5. The budget needs to be made part of the minutes with a motion and then an attachment. If no budget is adopted, a motion is needed to that effect, and the reason.
6. All adjournments need a motion. The time it took place also needs to be included in the minutes.
7. A statement needs to be made in order to call the meeting to order. "The meeting was called to order by the NAHUC President, \_\_\_\_\_, at (time).
8. The date needs to be included at the beginning of each day.

**B. Other statements**

1. The Board of Directors that are present at the start of the Board meeting need to be listed. When other Board of Directors members join the meeting, indicate this with a statement at the appropriate time in the minutes. Include the members that are not present, and if they are excused or not.
2. List any visitors indicating their name. Visitors that have left are not mentioned again.
3. Include correspondence in the minutes under items of interest.
4. When a presentation is made, include a brief statement about the presentation and the individuals involved. Any handouts are attached with an attachment number.

5. When a closed session is called for, a statement needs to be made indicating so. A time that it was called for, and a time that it ended, needs to be included. The reason for the closed session does not need to be included in the minutes.
- C. Miscellaneous items:
1. Only after the minutes have been reviewed in the next Board of Directors meeting and corrections made, can they be published.

Reference: NAHUC Legal Counsel

Approved: February 5, 1998 Revised: Jun 5, 2000; Aug 4, 2014; Reviewed: Aug 29, 2016; July 31, 2018; Sept 24, 2020, August 16, 2022	
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## **POLICY 403: RECORDING OF BOARD OF DIRECTORS MEETINGS**

**PURPOSE:** To specify who can record Board of Directors meetings

**PROCEDURE:**

- A. The NAHUC Secretary/Treasurer may record NAHUC Board of Directors meetings. No other person or persons are entitled to make their own recording.
- B. The NAHUC President shall make an announcement at the beginning of each meeting day that the meeting is being recorded.
- C. It is the responsibility of the NAHUC Secretary/Treasurer to delete the recording as soon after the minutes have been approved.
- D. The recording is solely for the use of clarifying official minutes of the meeting and will not be shared with other persons.

Approved: July 26, 1994	
Revised: Feb 3, 1996; Aug 4, 2014; Mar 25, 2022, August 16, 2022	
Reviewed: Aug 2016; July 31, 2018; Sept 24, 2020,	

## **POLICY 404: NAHUC CHECK DISBURSEMENT**

**PURPOSE:** To ensure an accurate and timely procedure for the disbursements of NAHUC funds.

**PROCEDURE:**

- A. The NAHUC Secretary/Treasurer shall disburse funds complying with established NAHUC budget guidelines.
- B. The NAHUC Secretary/Treasurer can either send checks electronically, or prepare a written check.
- C. The NAHUC President shall be notified of the disbursement of electronic checks and countersign all NAHUC paper checks.

Approved: July 15, 1992 Revised: Jun 22, 1998; Aug 4, 2001; Feb 20, 2014; Aug 4, 2014; Mar 25, 2022 Reviewed: Aug 2016; July 31, 2018; Sept 24, 2020, August 16, 2022	
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## **POLICY 405: NAHUC FINANCIAL INFORMATION SENT TO THE NAHUC BOARD OF DIRECTORS**

**PURPOSE:** To provide current financial information to the NAHUC Board of Directors.

**PROCEDURE:**

- A. Each month, the NAHUC Secretary/Treasurer shall:
  - 1. Send reconciled bank statements, and monthly financial information to the Board of Directors and to the NAHUC office (i.e. deposits, expenditures, copies of bank statements, charge card statement, etc.)
  - 2. Reports may also be generated upon request.

Approved: February 7, 1993 Revised: Jun 22, 1998; Aug 4, 2009; Aug 4, 2014; Aug 29, 2016; Mar 25, 2022 Reviewed: July 31, 2018; Sept 24, 2020, August 16, 2022	
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## **POLICY 406: EDUCATION CONFERENCE FINANCIAL REPORT**

**PURPOSE:** To provide an accurate account of Education Conference finances.

**PROCEDURE:**

- A. The NAHUC Secretary/Treasurer shall prepare an income and expense financial report of the Education Conference to present to the Board of Directors.
- B. The Secretary/Treasurer shall send an annual report that will include the Education Conference financial report.

Approved: February 9, 1985 Revised: February 4, 1989 Retired: February 7, 1993 Reinstated and Revised: February 5, 1998 Revised: Aug 14, 2014; Jul 30, 2017; Mar 25, 2022 Reviewed: Aug 29, 2016; July 31, 2018; Sept 24, 2020, August 16, 2022	
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## **POLICY 407: REIMBURSEMENT FOR BOARD OF DIRECTORS TRAVEL EXPENSES**

**PURPOSE:** Guidelines for reimbursement of travel expenses for NAHUC Board of Directors per established budgeted amounts set by the NAHUC Board of Directors. NOTE: The Director of the Certification Board is reimbursed per its accounts and policies, as this board is both administratively and financially independent.

### **PROCEDURE:**

- A. Fiscal Year and Reimbursement period
  - 1. The NAHUC fiscal year begins May 1 and ends April 30.
  - 2. Reimbursement for travel expenses needs to be requested within the same fiscal year that the expense occurred in order to be eligible to be reimbursed.
    - a. Travel reimbursement for Winter and Summer Board Meetings will be issued to Board Members up to the budgeted amount.
    - b. Other travel reimbursement requests with receipts included should be sent to the Secretary/Treasurer within 4-6 weeks of when the travel occurred.
  - 3. The Secretary/Treasurer needs to be notified of travel expenses that occur in April when the reimbursement request may be delayed in reaching the Secretary/Treasurer by April 30.
  - 4. Travel expenses incurred in one fiscal year and requested in the following or later fiscal years may be eligible for reimbursement if the person who incurred the expenses submits a request for the Board of Directors to consider regarding the reimbursement at the next scheduled Board Meeting. The Board of Directors may approve the reimbursement to come from the current fiscal year's budget if:
    - a. there are extenuating circumstances for not requesting the reimbursement in the fiscal year that it occurred, such as illness, death, disaster, etc., and
    - b. the current budget can be adjusted to meet the request.
- B. Reimbursable Travel Expense
  - 1. Travel to and from NAHUC Board of Directors meetings are reimbursable, using the most cost effective mode of transportation.
    - a. Airfare is covered in full up to \$650, which includes one piece of checked luggage. If the airfare is greater than \$650, the Board Member must get prior approval from the President before purchasing the ticket.
    - b. If a Board Member drives to and from the meeting and no airfare cost is incurred, total expenses are only reimbursable up to the average



cost of airfare. Documentation must be provided 60 days prior to the meeting.

- 1) Expenses that are reimbursable are: cost of gas or mileage at the current IRS mileage guidelines, hotel parking, and toll expenses.
  - 2) Car rental is not reimbursable unless prior approval by the Board of Directors is given.
2. Reimbursement for hotel, meal and transportation expenses will be based on a budgeted per diem amount for each day of attendance. Depending on the current NAHUC Board of Directors meeting budget, expenses may or may not be reimbursed in full.
- a. The NAHUC President will determine the number of days necessary for Board Members to attend required Board Meetings/Conference.
  - b. Board Members that attend less days than the determined amount will receive the per diem for each full day of attendance only.
  - c. Board Members that stay additional days will do so at their own expense.
  - d. Per diem will only be provided if the Board Member is registered at the NAHUC designated hotel.
3. Expenses paid by another organization are not reimbursed.

C. Reimbursements

1. Board Meetings/Conference Attendance
  - a. The Secretary/Treasurer will issue each Board Member a reimbursement check based on the number of days in attendance up to the budgeted amount.
2. Expenses Incurred from Individual Board Member Budgets
  - a. Each Board Member shall send receipts of expenses to the NAHUC Secretary/Treasurer for reimbursement.
3. Reimbursement for airfare may be requested prior to the meeting.
  - a. If a Board Member needs to cancel a flight, he/she is responsible for using the ticket for the next scheduled meeting or reimburse NAHUC for the amount of the ticket.
  - b. If the ticket needs to be changed, the Board Member will only be reimbursed if the amount does not exceed the budgeted travel amount (including the original cost of the airfare).
4. Unusual expense reimbursement requests will need Board approval.
5. The Secretary/Treasurer will reimburse the Board Member after receiving receipts or notify the Board Member if there will be a delay.

D. Non-reimbursable Travel Expenses

1. First Class air travel
2. Travel other than by the most direct route, which would incur additional expenses (such as a 3<sup>rd</sup> leg of a flight)
  - a. The Board Member asking for reimbursement in this circumstance must prove that the amount of the request is no more than a direct flight would cost.
3. Flight insurance and Travel Agency fees.
4. Traffic citations, parking tickets, other traffic violations
5. Vehicle repairs incurred during NAHUC travel
6. Accidents occurring during NAHUC travel
7. Expenses for NAHUC travel that are paid for by other organizations.

<p>Approved:</p> <p>Revised: Feb 4, 1989; Feb 9, 1991; Feb 7, 1997; Jun 28, 1999; Sep 24, 2001; Feb 26, 2005; Aug 27, 2006; Aug 4, 2009; Mar 1, 2012; Aug 4, 2014; Aug 29, 2016; July 31, 2018; Mar 25, 2022</p> <p>Reviewed: Sept 24, 2020, August 16, 2022</p>	
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## **POLICY 408: CHECKS RETURNED FOR NON-PAYMENT**

**PURPOSE:** To establish guidelines in dealing with persons who pay for NAHUC services using checks with insufficient funds.

**PROCEDURE:**

- A. The person sending a check with insufficient funding to pay for NAHUC services will have his/her name placed on an “Insufficient Fund” list at the NAHUC Office.
- B. Copies of checks returned from a bank to NAHUC for non-payment will be returned to the person writing the check.
  - 1. A copy of the returned check will be accompanied by a letter stating the reason for its return from the bank, along with a request for repayment by either Cashier’s check or money order within thirty (30) days. The request will also include repayment of any bank charges incurred by NAHUC.
  - 2. If there is no response to the initial letter, a second letter with a request for repayment will be sent within thirty (30) days.
- C. If repayment is not received, the member’s status is changed from active membership to non-payment status in the NAHUC database.

Approved: February 1, 1989 Revised: Feb 9, 1989; Feb 4, 2001; Aug 28, 2006; Feb 20, 2014; Reviewed: Aug 4, 2014; Aug 29, 2016; July 31, 2018; Sept 24, 2020, August 16, 2022	
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## **POLICY 409: NAHUC CREDIT CARD USAGE**

**PURPOSE:** To regulate and monitor usage of NAHUC’s Corporate Credit Card for payment of NAHUC related expenses.

**PROCEDURE:**

- A. The NAHUC Secretary/Treasurer will maintain the Corporate Credit Card(s).
- B. Use of this card is limited to approved NAHUC expenses.

Approved: September 24, 2001 Revised: Aug 4, 2009; Aug 4, 2014; Mar 25, 2022 Reviewed: Aug 29, 2016; July 31, 2018; Sept 24, 2020, August 16, 2022	
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## **POLICY 501: PROXY**

PURPOSE: Define the use of “Proxy”.

PROCEDURE:

- A. The Board will abstain from the use of Proxy, due to the fact is not generally accepted under Parliamentary Law.

Approved: June 12, 1984 Revised: Feb 4, 1989; Jun 23, 1997; Reviewed: Aug 4, 2014; July 30, 2018, April 2, 2020; Mar 25, 2022	
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## **POLICY 502: REPORTS TO BE DISCUSSED AT BOARD MEETING**

**PURPOSE:** Define the timeline for reports to submitted for Board of Directors Meetings.

**PROCEDURE:**

- A. Reports to be reviewed and discussed at the Board of Directors meetings are to be sent to the NAHUC Office by June 1st for Summer Board Meeting. The NAHUC Office will send the collection of reports to each Board Member before June 8<sup>th</sup> for Summer Board Meeting.
- B. The reporting dates will be from May 1<sup>st</sup> – April 30<sup>th</sup>.
- C. Reports are not to be amended with information or events that occur after the reporting dates.
- D. Late reports will not be accepted at the Board Meetings.

Approved: February 3, 1985 Revised: Feb 4, 1989; Jun 22, 1997; Jul 8, 2003; Feb 21, 2004; Mar 4, 2016; Jul 30, 2017; Reviewed: July 30, 2018, April 2, 2020; Mar 25, 2022	
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## **POLICY 503: HARASSMENT**

**PURPOSE:** NAHUC believes that every NAHUC member is entitled to an environment free of verbal, physical, visual or other harassment based on race, color, religion, sex, national origin, age, handicap, sexual preference, or any other reason. The expectation is that every member will adhere to this policy.

### **PROCEDURE:**

- A. The types of conduct governed by this policy include, but are not limited to:
  - 1. Actions by a Board Member, or any other member, which directly or indirectly threatens the conditions of a meeting, workshop or any other function.
  - 2. Unacceptable conduct, which includes verbal (offensive language, derogatory references towards race, color, religion, sex, national origin, age, handicap, sexual preference, etc.) abuse, and unwanted physical contact.
- B. Definition of Harassment
  - 1. NAHUC defines Harassment as follows:
    - a. Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature.
    - b. When submission to such contact is made either explicitly or implicitly a term or condition of an individual's employment or volunteer status.
    - c. When submission to or rejection of such conduct by an individual is used as the basis for employment or volunteer opportunity.
    - d. When such conduct has the purpose or effect of unreasonably interfering with an individual's work or volunteer performance, or creating an intimidating, hostile or offensive work or volunteering environment.
  - 2. This harassment includes, but is not limited to:
    - a. Use of suggestive comments, sexual language, obscene jokes or stories
    - b. Pressure for sexual activity
    - c. Remarks relating to a person's body or sexual activities
    - d. Patting, pinching or other unnecessary or unwanted touching
    - e. Demanding sexual favors accompanied by implied or overt threats concerning assignments
    - f. Physical assault
- C. Filing of Complaint
  - a. Any NAHUC member who believes that they have been subjected to

unlawful harassment of any kind has the responsibility to report the harassment immediately to the Ethics Committee using the Ethics Complaint Form. The NAHUC is committed to taking all reasonable steps to prevent harassment and will make every reasonable effort promptly and completely to address and correct any harassment that may occur.

- b. However, the NAHUC cannot take prompt and effective remedial action unless each member assumes the responsibility of reporting any incident of harassment immediately in writing.
2. If harassment is confirmed, The NAHUC President will recommend prompt and appropriate corrective actions be taken by the Board of Directors, which could include termination of office for a board member, removal from a committee, or cancellation of NAHUC membership as provided by the NAHUC Bylaws.
  3. Every report of harassment will be investigated promptly and impartially, with every effort to maintain member confidentiality.
    - a. After receiving a written complaint, the NAHUC Ethics Chair, within 10 days, will notify the NAHUC President, Board of Directors and the Ethics Committee (providing they are not the one being investigated) that a written complaint has been received.
    - b. The Ethics Committee will review the complaint and report their findings to the NAHUC Board of Directors within 30 days.
    - c. The complainant, Board of Directors and the accused will be informed of the results of the investigation. If the NAHUC finds that its policy has been violated, it will take appropriate corrective and remedial action, up to and including removing offending officers, directors or committee members from office, and/or similarly appropriate action towards offending vendors, contractors, or members within 14 days of completion of closed investigation.
  4. No form of retaliation will be taken against any person who alleges an incident of harassment.

Approved: July 25, 1994 Revised: Feb 2010; Mar 29, 2019; Aug 6, 2019 Reviewed: Mar 4, 2016; April 2, 2020; Mar 25, 2022	
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## **POLICY 601: CERTIFICATION BOARD, A COMMITTEE OF THE NAHUC BOARD OF DIRECTORS**

**PURPOSE:** To maintain the National Certification Program for Health Unit Coordinators.

**PROCEDURE:**

- A. The certification board shall consist of no more than four (4) members. As much as possible diversity will be represented on the Board.
  1. Director(s)
    - a. The director(s) shall be appointed by the NAHUC President with the approval of the NAHUC Board of Directors.
    - b. Shall be currently serving on the Certification Board.
    - c. Shall have valid NAHUC certification.
    - d. Shall serve a term of three years.
- B. Selection of Board Members; Term of Office
  1. Certification Board Members shall be appointed by the NAHUC President with approval of the NAHUC Board of Directors from candidate applications submitted to NAHUC and shall serve a term of three (3) years.
  2. Certification Board Members must be certified and members in good standing and hold current recertification status.
  3. Certification Board members must have had two full years experience before serving on the Certification Board.
- C. Removal from the Board
  1. Certification Board Members may be removed from office by resignation or by the NAHUC Board of Directors without cause. Replacements to serve the unexpired term shall be appointed by the NAHUC President, subject to a simple majority of the Board of Directors.
- D. Schedule of Meetings
  1. The Certification Board shall meet once a year and as the Director(s) deem necessary.
- E. Responsibilities
  1. The Director(s) shall present to the NAHUC Board of Directors an annual report showing all activities for the Certification Board and the goals for the next year.
  2. The Director(s) shall submit a complete financial statement to the NAHUC Board of Directors monthly.
  3. The Certification Board members, including the Director(s) will submit an annual Conflict of Interest statement to the Fiscal Affairs Committee Chair by January 1<sup>st</sup>.

4. Upon completion of office, the Director(s) must turn over to the NAHUC office all materials pertaining to the office within one (1) month of completion of the term. Any reimbursement owed by NAHUC Certification Board will be held until this task is completed.

<p>Approved:</p> <p>Revised: Feb 28, 1987; Feb 4, 1989; Jul 7, 1990; Jul 16, 1991; Feb 8, 1992; Feb 3, 1996; Feb 9, 1997; Aug 27, 2012; Aug 28, 2016; Jul 30, 2017; July 31, 2018; Sept 24, 2020</p> <p>Reviewed: August 16, 2022</p>	
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## **POLICY 701: EDUCATION BOARD: A SUBSIDIARY BOARD OF THE NAHUC BOARD OF DIRECTORS**

**PURPOSE:** To establish the composition and responsibilities of the Education Board.

**PROCEDURE:**

- A. Functions of the Education Board
  - 1. Establish, update, and support recognized standards of education for primary/initial and secondary/ continuing Health Unit Coordinator education.
    - a. Prepare and maintain current Health Unit Coordinator entry-level educational competencies.
    - b. Prepare and maintain the Health Unit Coordinator Education Program Procedure Guide.
    - c. Identify Health Unit Coordinator educational needs.
  - 2. Develop, implement, and monitor educational methods.
  - 3. Implement, and monitor the process of awarding contact hours.
  - 4. Develop opportunities to earn contact hours through the NAHUC Lending Library, Coordinator Questionnaire, Contact Hour Application for Workshops, and other requests.
  - 5. Develop, implement, and monitor process for Institutional Providership.
  - 6. Compile and utilize data on Health Unit Coordinator education programs.
  - 7. Develop, implement, and monitor resources for Health Unit Coordinator educators.
  - 8. Publicize information on Health Unit Coordinator education.
  - 9. Develop, implement, and monitor education board policies in accordance with NAHUC policies.
  - 10. Other functions as directed by the NAHUC Board of Directors.
  - 11. The Education Board Members, including the Director(s), will submit an annual Conflict of Interest Form.
  - 12. Appoint sub committees as needed.
  - 13. Hold an annual Education Board meeting and meet more often if need arises.
- B. Composition of the Education Board
  - 1. The Education Board shall consist of no more than four (4) members. The Education board members should represent diversity in experience, education, background, and geographical area. At least three quarters (3/4) of the education board composition should consist of health unit coordinator educators. The other one-quarter may be practitioners or supervisors.

- a. The Educators must have three (3) full years' experience in any one of and/or a combination of these situations: Educator in a state approved program and/or educator in a healthcare facility educating Health Unit Coordinators. The educator shall be a Certified Health Unit Coordinator and be a NAHUC member in good standing.
  - b. The Practitioner/Supervisor must have three (3) full years' experience working as a Health Unit Coordinator in a health care facility, and shall be a certified Health Unit Coordinator, and be a NAHUC member in good standing.
2. The Director(s) shall be appointed by the NAHUC President with the approval of the NAHUC Board of Directors.
    - a. The director(s) shall be an educator (one who coordinates and provides education for student Health Unit Coordinators and has a minimum of three (3) years' experience.
    - b. The director(s) shall have served at least the past year on the Education Board or the director(s) shall have served at least one term on the NAHUC Board of Directors or the Certification Board.
    - c. The director(s) shall be a certified Health Unit Coordinator and be a NAHUC member in good standing.
  3. Members of the Education Board shall be appointed by the NAHUC President with the approval of the NAHUC Board of Directors from candidate applications submitted to NAHUC and shall serve a term of three (3) years.
  4. Practitioner, Educator, or Supervisor Education Board members may be removed from office by resignation, or by the NAHUC Board of Directors without cause.

C. Education Board Director(s) Responsibilities

1. The Education Board will meet once a year, and as the Director(s) deem necessary. The director(s) shall preside at all Education Board meetings and oversee all correspondence.
2. The Director(s) shall delegate and ensure the orientation of new members to the Education Board.
3. The Director(s) shall appoint one member of the Education Board to act as recording secretary and other officers as deemed necessary.
4. The Director(s) shall present a report showing all activities to the NAHUC Board of Directors at the Summer Board Meeting, along with goals for the year.
5. The Director(s) shall present a concise report of the Education Board's activities for the past year and goals for the next year at Annual Business Meeting.

- 6. The Director(s) shall submit a proposed budget to the Fiscal Affairs Committee one (1) month prior to the Winter Board of Directors meeting.
- 7. Upon Completion of term, the Director(s) must turn over to the new director(s) all materials pertaining to the office within one (1) month of completion of the term. Any reimbursement owed from NAHUC will be withheld until this task is completed.

<p>Approved: June 12, 1984</p> <p>Revised: Feb 28, 1987; Feb 4, 1989; Jul 17, 1990;          Jul 16, 1991; Feb 8, 1992; Feb 3, 1996;          Feb 9, 1997; Feb 10, 2000, Feb 20, 2004;          Jun 8, 2004; Feb 20, 2014; Aug 4, 2015;          Jul 30, 2017; April 1, 2020</p> <p>Reviewed: Jun 14, 2021</p>	
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# **POLICY 702: HEALTH UNIT COORDINATOR EDUCATION RESOURCES**

**PURPOSE:** To provide Health Unit Coordinator Education Programs with information through a Program Resource Guide and entry level educational competencies.

**PROCEDURE:**

**A. Program Resource Guide:**

1. The Health Unit Coordinator Education Program Resource Guide (referred to hereafter as the guide) is a comprehensive handbook for establishing or evaluating a Health Unit Coordinator Education Program. The guide includes sample curriculum, resources and planning information. The guide contains practical advice for utilizing NAHUC resourced and documents. The guide includes the following NAHUC documents in its appendices:
  - Essential and Guidelines for a HUC Education Program
  - HUC Entry Level Educational Competencies
  - NAHUC Job Analysis
  - American Disabilities Act (ADA) Guidelines Sample
2. The Education Board will review and revise the guide and its appendices annually and revise as needed. The guide should be reviewed for accuracy in context and content. All information in the guide should reflect current NAHUC policies and practices.
3. Copies should not be made without permission from the Education Board. At the time of review, and as deemed necessary, the Education Board will determine the selling price of the resources.

**B. Entry Level Educational Competencies**

1. The Health Unit Coordinator Entry Level Educational Competencies (hereafter referred to as the competencies) are prepared and maintained by the Education Board in accordance with NAHUC Standards of Practice and Code of Ethics. The competencies outline the recommended knowledge base of the entry level Health Unit Coordinator. The competencies are an extension of the Certification Examination Content Outline from the NAHUC Job Analysis.
2. Copies should not be made without permission from the Education Board. At the time of review, and as deemed necessary, the Education Board will determine the selling price of the resources.

Approved: February 5, 1998 Revised: Feb 10, 2000; Jun 8, 2004; Aug 4, 2015; Jul 31, 2017; Reviewed: April 1, 2020; Jun 14, 2021	
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## **POLICY 706: STANDARDS OF PRACTICE REVIEW**

**PURPOSE:** Schedule for the review the Standards of Practice.

**PROCEDURE:**

- A. Standards of Practice will be reviewed by the NAHUC Education Board every 5 years on the following cycle:
  - 1. 2015
  - 2. 2020
  - 3. 2025
- B. A written report will be submitted after each review.
- C. Standards of Practice may be reviewed more often if deemed necessary by the Education Board.

Approved: February 21, 1986 Revised: Feb 4, 1989; Feb 9, 1991; Feb 7, 1993; Feb 10, 2000; Jun 8, 2004; Aug 4, 2015; Reviewed: Jul 31, 2017; April 1, 2020; Jun 14, 2021	
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## **POLICY 801: NAHUC CONFERENCE/WORKSHOP REFUNDS**

**PURPOSE:** To establish guidelines in the issuing of refunds for conference/workshop cancellations.

**PROCEDURE:**

- A. Request for Refund
  - 1. All requests for refunds must be in writing and sent to the NAHUC Office.
- B. Refund Amounts
  - 1. Full refund (100%) will be issued for cancellations received by the NAHUC office before the first registration deadline for the conference/workshop.
  - 2. Partial refund (50%) will be issued for cancellations received by the NAHUC Office after the first registration deadline and before second registration deadline for the conference/workshop.
  - 3. No refund will be issued for cancellations received after the second deadline for the conference/workshop, or for “no shows”.
- C. Transferring of Registrations
  - 1. If a person registered is unable to attend, the registration may be transferred to another person for that same conference/workshop. Notification of the intent to transfer the registration must be in writing and sent to the NAHUC Office.
  - 2. Registrations may be transferred to a future conference/ workshop with the approval of the NAHUC Board of Directors.
- D. Refunds
  - 1. Within one (1) month of receiving written request, a refund will be issued to the payee in the same form that it was submitted

Approved: Sep 24, 2001	
Revised: Feb 24, 2008; Feb 21, 2014; Mar 4, 2015;	
Reviewed: July 30, 2018, April 2, 2020; Mar 25, 2022	



## **POLICY 802: SALES OF MERCHANDISE/SERVICES AT NAHUC EDUCATION CONFERENCE, NAHUC SPONSORED WORKSHOPS**

**PURPOSE:** To assure that the types of merchandise and/or services that may be displayed/sold at NAHUC sponsored conferences/workshops are in accordance with the policies of the Association.

**PROCEDURE:**

- A. Vendors with professionally relevant products, services, educational or career opportunities may request to have a display. Display forms may be obtained from the NAHUC office or on the NAHUC web site.
- B. NAHUC shall have the right and responsibility of evaluating the merchandise/services of vendors who express interest in having a display, and then accepting or declining the request to display.
- C. NAHUC shall not discriminate against a vendor when requests from other vendors in the same market are accepted.
- D. The Board of Directors will set a fee structure for the privilege to display.
- E. Completed request to display forms and fees are to be sent to the NAHUC office.
- F. Upon receiving a request to display merchandise/services, NAHUC will determine if the request will be accepted or declined within ten (10) days, and the requestor will be notified.

Approved: February 13, 2003 Revised: Aug 4, 2014; Reviewed: Mar 4, 2016; July 30, 2018, April 2, 2020; Mar 25, 2022	
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## **POLICY 803: EDUCATION CONFERENCE REGISTRATION FEES**

**PURPOSE:** To ensure consistency in fee structure for the annual education conference.

**PROCEDURE:**

- A. The annual NAHUC Education Conference registration fee is set by the Board of Directors.
- B. Registration fee for members
  - 1. The registration fee for members is set in order to cover the estimated costs of the conference.
  - 2. The registration fee is structured to increase according to stated dates in the conference brochure.
- C. Registration fee for non-members is set above the NAHUC member fee in order to encourage membership.
- D. Registration fee for students is reduced by 50% with proof of enrollment in a health unit coordinator program.
- E. Refund: Refer to Policy #801 for refund criteria.

Approved: February 26, 2005	
Revised: Feb 24, 2008; Feb 21, 2014; Mar 4, 2016	
Reviewed: July 30, 2018, April 2, 2020; Mar 25, 2022	

## **POLICY 901: AWARDS COMMITTEE**

**PURPOSE:** Functions of the Awards Committee, which operates under the direction of the NAHUC Board of Directors.

**PROCEDURE:**

- A. Committee membership to consist of an uneven number of NAHUC members in good standing (at least 3, no more than 9) to ensure a majority vote on issues.
- B. Duties Specific to the Awards Committee
  1. Reviews procedures and conducts voting process for annual recognition awards for CHUC, Outstanding Individual, and Institutional Provider/Institution or Educator of the Year.
  2. In conjunction with the NAHUC Office, the Committee Chair verifies nominee membership/certification status before including them on the ballot.
  3. Informs NAHUC Office and NAHUC President of voting outcome, so the awards may be ordered by the Committee Chair or designee for presentation at the annual Education Conference.
  4. Where possible, the Committee Chair or a Committee Member will present the awards at the annual Education Conference.
  5. The Committee Chair or an assigned Committee Member will submit an article highlighting the Award winners for publication in the next *Coordinator* after the annual Education Conference.

Approved: February 4, 1989 Revised: Feb 7, 1993; Jun 22, 1997; Feb 5, 1998; Feb 6, 2009; Aug 28, 2016; July 31, 2018 Reviewed: Mar 3, 2017; Mar 29, 2019	
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## **POLICY 902: AWARDS CRITERIA**

**PURPOSE:** To give recognition in the form of an award, to individuals or institutional provider who have contributed and supported other Health Unit Coordinators.

**PROCEDURE:**

**CATEGORIES:**

**CERTIFIED HEALTH UNIT COORDINATOR OF THE YEAR**

**INSTITUTIONAL PROVIDER, INSTITUTION, or EDUCATOR OF THE YEAR**

**OUTSTANDING INDIVIDUAL OF THE YEAR**

- A. All nomination forms are to be sent to the NAHUC office on or before April 30<sup>th</sup> of each year. A copy of the nomination form is to be forwarded to the Awards Committee Chairperson. All nominations are to be sent to the Awards Committee by the Chairperson on or before May 10<sup>th</sup> of each year. The Award Committee will send their selection of each award category to the Chairperson on or before May 25<sup>th</sup> of each year.
- B. Nominations should be in narrative form of not more than 500 words and must contain supportive documentation for criteria.
- C. Nomination letters should include the name and address of the facility or former employer (for retired persons) and the name of the supervisor or former supervisor of the nominee.
- D. When nominating an institution or facility, include the name of an administrator and the address of the facility
- E. No award may be given to the same member or Institutional Provider/Institution or Educator within a three (3) year period. A member may receive an award in a different category within a three (3) year period. *Example: Joe NAHUC, was awarded CHUC (Certified Health Unit coordinator) of the year in 1999 and was awarded Outstanding Individual of the Year in 2000.*
- F. All members, including the NAHUC Board of Directors are eligible for awards, with the exception of the members and chairperson of the Awards Committee. They are ineligible (as defined by the Board of Directors), for any award while serving on that committee.
- G. The NAHUC President will receive a complete list of the nominees prior to the committee balloting; the Awards Chairperson will inform the NAHUC Office and the NAHUC President of the voting outcome. Announcement of all nominees and winners will be made during the NAHUC National Education Conference each year.
- H. In order for a person to be eligible for the Certified Health Unit Coordinator of the Year, they must:
  - 1. Be a member in good standing of NAHUC for at least one (1) year.
  - 2. Be a Certified Health Unit Coordinator with current certification status, working in a hospital or health care facility.

3. Be a role model for peers and practice personal and professional development through continuing education.
  4. Actively participate in the National Association of Health Unit Coordinators on the local or national level.
- I. In order for an Institutional Provider to be eligible for the Institutional Provider of the Year award they must:
    1. Be a current Institutional Provider and all fees to NAHUC must be current.
    2. Support the professional growth of the institution's health unit coordinators through education and other activities.
  - J. In order for an Institution or Educator to be eligible for the Institution or Educator of the Year award they must:
    1. Support the professional growth of the institution's health unit coordinators through education and other activities.
  - K. In order for a person to receive the Outstanding Individual of the Year, they must:
    1. Be a member in good standing of NAHUC for at least one (1) year.
    2. Be an individual who has been exemplary in promoting and supporting Health Unit Coordinating certification, education, and professional growth.

<p>Approved: July 8, 1995</p> <p>Revised: Feb 4, 1996; Feb 9, 1997; Jun 1999; Feb 6, 2009; Mar 3, 2017; July 31, 2018</p> <p>Reviewed: Mar 29, 2019</p>	
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# **POLICY 903: AWARDS FOR OUTGOING NAHUC OFFICERS, BOARD MEMBERS AND COMMITTEE CHAIRS**

**PURPOSE:** To ensure consistency in the making and giving of recognition awards for outgoing Officers, Board Members and Committee Chairs.

**PROCEDURE:**

- A. A Past President’s pin will be awarded to the outgoing President at the conclusion of his/her term.
- B. Certificates with the NAHUC Logo will be awarded to both finished and unfinished terms with dates of service included.
  - 1. Format for the Certificates:

*TO*  
*(NAME OF INDIVIDUAL)*  
**IN APPRECIATION**  
*FOR (HIS/HER) SERVICE TO THE*  
*NATIONAL ASSOCIATION OF HEALTH UNIT COORDINATORS*  
*AS (OFFICE/POSITION) (YEAR TO YEAR)*

- C. Where possible, presentation of these awards will be made at the Annual Business Meeting at the annual Education Conference.
- D. NAHUC funds may not be used for any additional award or gift for an outgoing officer or Board Member without approval from the Board of Directors.

Approved: February, 1983 Revised: Feb 4, 1989; Feb 9, 1991; Feb 7, 1993; Jun 22, 1997; Feb 10, 2000; Aug 4, 2009; Mar 3, 2017; Reviewed: Aug 2,2011; Mar 29, 2019	
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## **POLICY 1001A: NATIONAL CHAPTER AFFILIATION**

**PURPOSE:** An affiliated National Chapter is an extension of the National Association of Health Unit Coordinators (NAHUC). The National Chapter’s prime responsibility is to carry on and uphold the ideals and principles of NAHUC at the local level. The National Chapter is subject to all rules and regulations established by NAHUC.

**PROCEDURE:**

- A. Groups within the United States requesting to affiliate with NAHUC need to submit a formal application to the NAHUC Office.
  - 1. The group requesting affiliation needs at least five (5) NAHUC members.
  - 2. “How to Form a National Chapter” packet is obtained from the NAHUC Office. The packet includes:
    - a. National Chapter Affiliation forms.
    - b. NAHUC policies regarding affiliation with NAHUC.
  - 3. The formal application criteria include submitting the following documents and fee:
    - a. Motion to affiliate
    - b. Affiliation statement
    - c. Officer list
    - d. Membership list
    - e. Bylaws
    - f. Affiliation fee
- B. The submitted information will be verified, if any of the criteria is not met, the applying National Chapter will be contacted regarding the deficiency within 30 days of the receipt of the documents.
- C. If all the criteria have been met, notification will be sent to the applying National Chapter informing them of the date of their application being presented to the NAHUC Board for final approval.
- D. The next time the NAHUC Board meets, a vote will be taken regarding affiliation of the applying National Chapter.
- E. The Board’s decision is communicated to the applying National Chapter within 14 days of the date of the decision.
- F. A Certificate of Affiliation will be presented to the newly affiliated National Chapter.

Approved: June 5, 2000 Revised: Aug 1, 2002; Jun 8, 2004; Mar 1, 2012; Aug 4, 2015; Jul 31, 2017; Mar 15, 2018 Reviewed: Aug 6, 2019, Jun 14, 2021	
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## **POLICY 1002A: NAHUC NATIONAL CHAPTER AFFILIATION STATUS**

**PURPOSE:** Upon affiliation with the National Association of Health Unit Coordinators, each National Chapter must function within the defined criteria. Failure to do so may result in the loss of the National Chapter's affiliation and the dissolution of the National Chapter.

### **PROCEDURE:**

- A. Criteria to maintain an active National Chapter Status:
1. National Chapters will be sent a check list of the required forms by April 1<sup>st</sup>. The National Chapter will submit the following documents to the NAHUC Office by May 1<sup>st</sup>.
    - a. Federal Tax Exempt Status Report
    - b. Bylaws Update
    - c. Report of the previous year's activities
    - d. List of all Chapter Officers
    - e. List of all Chapter Members
    - f. A copy of the Chapter's most current bank statement.
  2. The National Chapter's annual affiliation fee shall be included with the annual report.
  3. National Chapter shall follow the standard National Chapter Bylaw format, as determined by the NAHUC Board of Directors.
  4. The National Chapter shall conduct meetings openly and according to Parliamentary procedures (such as Robert's Rules of Order).
  5. All National Chapter members maintain current NAHUC membership.
  6. The National Chapter shall be supportive of the mission of NAHUC by upholding the ideals and principles of NAHUC.
  7. Sales Tax Exemption
    - a. All NAHUC affiliated National Chapters **must not** file for State Tax Exemption.
    - b. Each Affiliate is responsible for paying all sales taxes.
  8. Maintain records according to the current ASAE (America Society of Association Executives) guidelines.
- B. Dissolution of a National Chapter
1. Any or all National Chapter Officers are responsible for initiating the dissolution procedure should the National Chapter be unable to fulfill the criteria for active status.
  2. A meeting should be scheduled to discuss the dissolution.



- a. One person should be selected to chair the meeting and one person to take minutes.
  - b. National Chapter Members should be notified of the meeting at least two weeks in advance.
  - c. During the meeting allow all members to express their opinion.
  - d. At the end of the discussion, the Chairperson should entertain a motion regarding the dissolution.
  - e. Minutes of this meeting should be maintained with other National Chapter records.
3. If two-thirds of the members present vote to dissolve the National Chapter, the group will:
    - a. Send the decision to dissolve the National Chapter and a National Chapter membership list to the NAHUC Office within seven (7) days of the decision.
    - b. Send all financial records and minutes to the NAHUC within thirty (30) days of the decision to dissolve.
  4. A cashier's check payable to NAHUC for the balance of funds in the National Chapter's account(s) shall be sent to the NAHUC Office within thirty (30) days.
  5. A motion will be made at the next NAHUC Board of Directors meeting to dissolve the National Chapter as requested.
- C. Dissolution of a National Chapter by the NAHUC Board of Directors
1. If a National Chapter is found in violation of the ideals, principles or regulations of NAHUC, the NAHUC Board of Directors may dissolve the National Chapter at the next scheduled Board of Director's meeting. National Chapters that do not file an annual report will be dissolved.
    - a. The National Chapter President shall be sent a letter outlining the violation and giving instructions on corrective measures. A copy of this letter may be sent to other National Chapter Officers.
  2. The National Chapter shall be given thirty (30) days to respond.
    - a. If the National Chapter corrects the violation, the National Chapter shall remain in good standing.
    - b. If no response is received, a second notice shall be sent to the National Chapter President and all officers on record that includes a request to respond within thirty (30) days.
    - c. If there is no response from any members, the NAHUC Board of Directors will dissolve the National Chapter at the next scheduled Board meeting
  3. If the Board Members vote to dissolve the National Chapter:
    - a. The National Chapter will be notified of the decision to dissolve.

- b. The National Chapter will submit all financial records and minutes to the NAHUC Office within thirty (30) days.
- c. A cashier's check payable to NAHUC for the balance of funds in the National Chapter's account(s) shall be sent to the NAHUC Office within thirty (30) days.

<p>Approved:</p> <p>Revised: Feb 4, 1989; Feb 9, 1991; Feb 7, 1993;  Feb 9, 1997; Jun 23, 1997; Jun 5, 2000;  Feb 20, 2004; Jun 8, 2004; Aug 29, 2006;  Aug 5, 2007; Mar 1, 2012; Aug 4, 2015;  Mar 4, 2016; Mar 15, 2018; Mar 25, 2022</p> <p>Reviewed: Jul 31, 2017; Aug 6, 2019;  Jun 14, 2021</p>	
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## **POLICY 1004: NAHUC NATIONAL AND INTERNATIONAL CHAPTERS AFFILIATION RECOGNITION**

**PURPOSE:** To recognize the anniversaries of NAHUC Chapters who maintain their affiliation in 5-year increments (i.e. 5, 10, 15, etc.).

**PROCEDURE:**

- A. Qualification
  - 1. To qualify for recognition, a Chapter must have maintained current affiliation per NAHUC policy consistently for at least 5 years.
- B. Notification
  - 1. Certificate of Recognition will be given to a Chapter representative at the annual Education Conference or will be sent to the Chapter President if a representative is unable to attend the Education Conference.
  - 2. Chapters that have received recognition will be published in the annual corporate report.

Approved: September 25, 2001 Revised: Mar 15, 2018; Reviewed: Mar 1, 2012; Aug 4, 2015; Jul 31, 2017; Aug 6, 2019; Jun 14, 2021	
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## **POLICY 1101: ELECTION CYCLE/TIME LINE**

**PURPOSE:** To establish a standardized process for the yearly NAHUC election of Board members and to establish guidelines to be followed in addressing issues regarding election and ballot validity.

**PROCEDURE:**

- A. Rotation of Elections Cycle
  1. Election 2024 for –2024-2027 Term: Vice President.
  2. Election 2025 for 2025-2028 Term: President and Director at Large.
  3. 2026- No election. 2026 Winter BOD Appointments for Certification and Education Board Directors for Term 2026-2029.
- B. Candidates who wish to run for elected office and want their names on the submit their candidate applications to the NAHUC Office by January 15.
- C. The NAHUC Office will then have 15 Days to verify candidate information, create the ballot, and send the ballots to the membership.
- D. Ballots will be sent to NAHUC members whose membership is current. New membership and renewal forms must be received **BEFORE** the date the ballots are sent.
- E. Ballots will include a space for the member’s name and NAHUC membership number. Ballots returned **without** this information **WILL NOT** be counted.
- F. Members will have 14 Days to vote and submit their ballots back to the NAHUC Office to be tallied.
- G. If a member has not received the ballot February 18, they should contact the NAHUC office by that date.
- H. The NAHUC Office will notify the President of the election outcome as soon as the ballots are tallied. The tallying must be completed by February 28. The President will then notify all candidates in writing of the election results, including total number of votes cast for each candidate.
- I. Candidates challenging election results will have 15 days from the date of notification from the President to submit a request for a recount. The request must be in writing and sent by certified mail to the NAHUC Office.
- J. Upon receipt of the certified letter challenging election results, the NAHUC Office will notify the President and all other candidates for the same office of the request for a recount.
- K. The NAHUC Office will forward all original ballots in question to the President for a recount within 30 days of the receipt of the certified letter, with tracking documentation.
- L. The President will notify the challenging candidate and all other candidates for that office the results of the recount. The recount will be the final election result.

- M. Election outcomes will be published in the next issue of *the Coordinator* following the election process.

Approved: September 25, 2001 Revised: Aug 6, 2002; Jul 8, 2003; Mar 20, 2015; Mar 5, 2016; Mar 29, 2019; Mar 25, 2022, August 16, 2022, March 25, 2023 Reviewed: Mar 3, 2017;	
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## **POLICY 1201: ETHICS COMMITTEE**

**PURPOSE:** Functions of the Ethics Committee, which operates under the direction of the NAHUC Board of Directors

**PROCEDURE:**

- A. Committee membership to consist of an uneven number of NAHUC members in good standing (at least 3, no more than 5) to ensure a majority vote on issues.
- B. Duties Specific to the Ethics Committee
  1. Report all complaints regarding violations of the NAHUC Code of Ethics to the NAHUC President within 10 days of notification.
  2. Investigate any alleged violations of the NAHUC Code of Ethics within 30 days.
  3. Submit a written report of the findings of the violation/complaint and recommendations to the NAHUC Board of Directors within one (1) week of completion.
  4. Submit an annual report after the fiscal year ends on April 30<sup>th</sup> and due to the Board of Directors before June 1<sup>st</sup> .

Approved: February 1998 Revised: Feb 2010; Mar 1, 2012; Mar 4, 2016; Aug 28, 2016; Aug 1, 2017; Aug 6, 2019 Reviewed: July 30, 2018, April 2, 2020; Mar 25, 2022	
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## **POLICY 1202: CONFLICT OF INTEREST/CERTIFICATE OF DISCLOSURE**

**PURPOSE:** To ensure that members that participate on boards or committees avoid actions and relationships, which could result in a conflict of interest.

**PROCEDURE:**

- A. Each Board of Directors member, Certification and Education Board members, and Committee Chairpersons of the National Association of Health Unit Coordinators shall annually disclose actions and relationships which could result in a conflict between personal financial interests and any duty owed to NAHUC, and its related boards and committees.
- B. Those applying for NAHUC Offices will submit a Conflict of Interest/Certificate of Disclosure form with the NAHUC Candidate Application.
- C. Signed Conflict of Interest/Certificate Forms will be kept on file at the NAHUC Office until the person's term of office ends.

Approved: February 4, 1996 Revised: Feb 13, 2003; Mar 1, 2012; Mar 4, 2016; April 2, 2020, August 16, 2022 Reviewed: July 30, 2018; Mar 25, 2022	
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## **POLICY 1301: FISCAL AFFAIRS**

**PURPOSE:** The NAHUC Board of Directors has the responsibility of preparing the annual budget. The NAHUC Board of Directors will provide the membership with information regarding the budget when requested.

**PROCEDURE:**

- A. The fiduciary responsibilities are performed by the NAHUC Board of Directors.
- B. Meetings, Quorum
  - 1. The NAHUC Board of Directors shall meet bi-annually.
  - 2. A simple majority shall constitute a quorum
- C. Responsibilities
  - 1. Prepares the annual budget.
  - 2. The Secretary/Treasurer will submit a mid-year and annual written financial report.
  - 3. Submit the annual budget for Board approval. This budget should include the previous year's budget, the proposed budget for the year and projected budget for the next year.
  - 4. Submit a Conflict of Interest Statement and Certificate of Disclosure during the Winter Board of Director's meeting.
  - 5. Ensure the Association works within the approved budget.
  - 6. The Secretary/Treasurer maintains records.

Approved: Revised: Feb 4, 1989; Jun 22, 1997; Aug 24, 2005; Aug 3, 2009; Mar 1, 2012; Mar 20, 2015; Sept 24, 2020; Mar 25, 2022, August 16, 2022 Reviewed: Aug 29, 2016; July 31, 2018	
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## **POLICY 1302: BUDGET**

**PURPOSE:** The NAHUC Board of Directors sets a budget at every Winter Board Meeting for the next Fiscal Year. This budget can be adjusted at future Board Meetings as necessary.

**PROCEDURE:**

- A. Proposed Budget
  - 1. The NAHUC Board of Directors presents a budget for the next fiscal year to be approved at the Winter Board Meeting.
    - a. The proposed budget is based on historic figures, revenue projections, and future projects.
    - b. The budget may be revised only at a Board Meeting.
    - c.

Approved: February 2, 1987 Revised: Feb 4, 1989; Jun 28, 1999; Feb 16, 2007; Mar 1, 2012; Mar 20, 2015; Mar 25, 2022, August 16, 2022 Reviewed: Aug 29, 2016; July 31, 2018; Sept 24, 2020	<b>CROSS-REFERENCING</b> -Board of Directors - Regional Representative -Standing Committees -Secretary/Treasurer
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## Retirement

**PURPOSE:** To define operating procedures to be used in the administration of the investment portfolio of NAHUC.

**PROCEDURE:**

- A. Investment Decision Making
  - 1. The procedures are approved by the Board of Directors
  - 2. Securities transactions will be conducted with a financially strong and reputable firm selected by the NAHUC Board of Directors, and approved by the Board of Directors.
    - a. A record of all monies invested will be included in the Secretary/Treasurer 's an annual report, and in the Annual Budget.
- B. Investment Objective
  - 1. The primary objective is to convert the excess cash resulting from deposit inflow into earnings assets. The portfolio will be drawn down when necessary in order to accommodate deposit withdrawals or other contingencies.
    - a. The monies are to be used to defray expenses at the discretion of the NAHUC Board.
    - b. To fund Ad Hoc Committees and/or their projects.
  - 2. The invested amount should not exceed the minimum amount required for the checking account and budgeted expenses.
- C. Portfolio Composition
  - 1. NAHUC funds are limited and unpredictable, therefore, the time elements of six months to one year is advisable.
  - 2. The Portfolio should be compromised of securities with the following characteristics:
    - a. A low degree of default risk
    - b. A low degree of price risk resulting in changes in interest rates.
    - c. A high degree of marketability (unless maturity is short term).
  - 3. The following investments are permitted and authorized by the Board of Directors:
    - a. Certificates of Deposit issued by nationally chartered and state-chartered banks in the United States, insured by the Federal Deposit Insurance Corporations (FDIC).
    - b. Certificates of Deposit insured by savings and loan associations in the United States, insured by the Federal Savings and Loan Insurance Corporation (FSLIC).

- c. Savings and Checking accounts in banks which are in the United States, insured by FDIC and FSLIC.

D. Maturity of Investments

1. The maturity distribution must be controlled to reduce the loss resulting from increases in the demand of withdrawals.
2. The Fiscal Affairs Committee shall restrict investment decisions to securities with a maturity of one (1) year or less.
3. The Board of Directors must approve the decision to invest in securities with maturities of greater than one (1) year.
4. When sufficient funds are being generated to cover short term needs, investments with a maturity of one (1) to two (2) years may be considered.
5. Investment in securities which mature in excess of two (2) years will not be considered.

E. Diversification Requirements

1. The amount invested in Certificates of Deposit (CD's) of a single bank is limited to \$25,000.00. The purpose of these limitations is to achieve diversification and avoid an unwarranted concentration of funds in a single entity that is subject to default risk.

F. Unauthorized Transactions

1. The following are unauthorized:
  - a. Futures contracts, which are an agreement calling for a fixed price that delivers standardized Commodities including certain U.S. Government and agency securities.
  - b. Forward-placement contracts:
    - 1) Stand-by commitment, which is an agreement for the sale of a security at a future date, whereby the buyer of the security is required to accept delivery at the option of the seller.
    - 2) Cash-forward agreement, which is an agreement to purchase or sell a security at a future date with mandatory delivery and acceptance.
  - c. Short sales, which is the sale of a security that is not owned by the seller.
  - d. Adjusted trades, which is the method of hiding an investment loss by selling a security at a fictitiously high price to a dealer and simultaneously buying another over-priced security from the same dealer.

G. Exceptions and Review

1. The Board of Directors recognizes that minor policy exceptions may be necessary from time to time. In such instances, the Fiscal Affairs Committee

should use its best judgment. However, the Board of Directors should approve significant deviations from this policy.

<p>Approved: July 16, 1990</p> <p>Revised: Sep 25, 2001; Mar 20, 2015; Jul 30, 2017; July 31, 2018; Mar 25, 2022</p> <p>Reviewed: Mar 1, 2012; Aug 29, 2016; Sept 24, 2020</p>	
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## **POLICY 1304: CONTRACT REVIEW**

**PURPOSE:** To ensure that contractual obligations of NAHUC and related entities are in the best interest of NAHUC. This is intended to cover all contractual obligations of NAHUC and its affiliates with uniform guidelines.

**PROCEDURE:**

- A. NAHUC Board of Directors will review and approve the following prior to President's signature:
  - 1. All agreements that commit NAHUC past one (1) year.
  - 2. All lease agreements to ensure that bond covenants are not breached.
- B. All contracts of any nature that bind NAHUC will be submitted to the President for review and signature.
- C. Any contracts not meeting the criteria of the items listed above will be handled at the Board of Director's discretion.

Approved: February 3, 1996 Revised: Feb 7, 1997; Sep 25, 2001; Mar 1, 2012; Aug 29, 2016; Reviewed: July 31, 2018; Sept 24, 2020, August 16, 2022	
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## **POLICY 1305: DONATIONS**

**PURPOSE:** To establish guidelines on how to designate the use of donations. NAHUC is a 501(c)3 corporation and all donations are tax deductible.

**Procedure:**

- A. The NAHUC Secretary/Treasurer will document any donations (cash, checks, etc.) received by NAHUC, from whom it was received, and the directed purpose of the donation. If no purpose is noted, then monies will be used where needed at the discretion of the NAHUC Board of Directors.
- B. Examples include, but not all inclusive:
  - a. Funding and/or expanding education opportunities i.e.: virtual lending library
  - b. Awards
  - c. Scholarships

Approved: August 2022	
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## **POLICY 1801: PUBLICATIONS COMMITTEE**

**PURPOSE:** Functions of the Publications Committee, which operates under the direction of the NAHUC Board of Directors. The Publication Committee has the responsibility of reviewing and approving the content and appearance of all publications and promotional material for distribution to NAHUC membership, along with the NAHUC web site. The term “publication” may include brochures, newsletters, and other written material designed to promote or communicate information to the general public and NAHUC membership.

**PROCEDURE:**

- A. Committee membership to consist of an uneven number of NAHUC members in good standing (at least 3, no more than 5) not to include the Communication Director to ensure a majority vote on issues.
- B. Duties Specific to the Publications Committee
  - 1. Edit materials submitted for publication in “the Coordinator”, and contribute articles as needed.
  - 2. Assist with the content of the NAHUC web site, and other NAHUC social media platforms.

Approved: Revised: Feb 4, 1989; Feb 1998; Feb 26, 2005; Feb 6, 2009; Aug 29, 2016; Jul 31, 2017; April 2, 2020; Mar 25, 2022 Reviewed: Aug 4, 2015; Jun 14, 2021	
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## **POLICY 1802: MEDIA**

**PURPOSE:** Representation of NAHUC through any mass media.

**PROCEDURE:**

- A. If a member of NAHUC is approached by any mass media to represent NAHUC, the inquiring individual(s) should be directed to obtain information from the NAHUC Office, the NAHUC Web Site, or the NAHUC President.

Approved: February 3, 1984 Revised: Feb 4, 1989; Jul 16, 1990; Jul 17, 1990; Feb 7, 1997; Feb 13, 2003; Jul 31, 2017; Reviewed: Aug 4, 2015; April 2, 2020; Jun 14, 2021	
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## **POLICY 1803: ADVERTISEMENT IN NAHUC OFFICIAL PUBLICATIONS**

**PURPOSE:** “*the Coordinator*” is owned by the National Association of Health Unit Coordinators, Inc., and shall offer advertising space in accordance with the aims and policies of the Association.

**PROCEDURE:**

- A. No advertisement shall be accepted which is detrimental to the profession of Health Unit Coordinating, and not in the best interest of those practicing a health care profession.
- B. Advertisement shall be accepted which furthers the education, employment and welfare of Health Unit Coordinators.
- C. It is the responsibility of the Publication Committee to investigate, evaluate and accept advertising, or refuse such advertising deemed not in the best interest of NAHUC.
- D. The Publication Committee shall not discriminate against an advertiser when advertisements are accepted from a company or individual selling or buying goods in the same market.
- E. The Publication Committee will recommend a fee structure for advertisements of different sizes in accordance with current and fair market practices.
- F. Any individual, organization or company may apply for the privilege to advertise in any NAHUC official publication by contacting the Publication Committee Chairperson via the NAHUC Office.
- G. A NAHUC Institutional Provider, Chapter or NAHUC Committee may announce on the NAHUC Calendar the following at no charge:
  - 1. Seminars, Workshops, Educational Events
  - 2. Entertainment or Recreational Events
- H. Individuals, organizations, or companies which are non-NAHUC may advertise the following for full fee:
  - 1. Seminars, Workshops, Educational Offerings
  - 2. Entertainment or Recreational Events
  - 3. Employment opportunities
  - 4. Goods and services
- I. Upon receiving a request to advertise, the Publication Committee will determine if the advertisement will be accepted or rejected within ten (10) days, and notification will be sent to the requestor.
- J. If the Publication Committee denies a request to advertise, the fees that accompanied the request will be returned to the requestor within ten (10) days.

- K. All monies received for accepted advertising will be sent to the NAHUC Office for deposit in the NAHUC Treasury.
- L. The Publication Committee will have the final determination on all advertisement applications and shall reserve the right to refuse advertising space without cause.
- M. All fees must be paid in full prior to the next publication submission deadline.

Approved: Revised: Feb 4, 2001; Jun 8, 2004; Mar 4, 2016; Jul 31, 2017; April 2, 2020; Mar 25, 2022 Reviewed: Jun 14, 2021	
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## **POLICY 1804: SOCIAL MEDIA GUIDELINES**

**PURPOSE:** For NAHUC to maintain a presence on all social media and networking sites in order to encourage people and organizations to take an active role in leading informed lives by sharing ideas and information with as many people as possible via social media websites (i.e. Facebook, Instagram, Twitter, LinkedIn) Also, we encourage our members and non-members to seek a reliable source of news updates, share stories, make friends and be a part of our growing online community and information regarding health unit coordinating, certification and education.

**PROCEDURE:**

- A. Comments should be made with respect to NAHUC members, non-members and other organizations. This is not a venue for personal attacks, misleading information about health issues, spam or product ads.
- B. Only appropriate comments are accepted. Comments will be deleted if it contains any of the following:
  - 1. Hate speeches or harassing, bullying or discriminatory language
  - 2. Profanity, vulgarity, or obscenities
  - 3. Nudity or offensive material in profile pictures
  - 4. Information that misleads others about health unit coordinating or healthcare issues
  - 5. Information that is intended to provide specific medical advice or diagnosis rather than general medical information
  - 6. Defamation to a person, groups of people or an organization
  - 7. Comments intended to sell or market a product and services, except as expressly supported by NAHUC
  - 8. Any comments by the public, that the NAHUC Board of Directors, Communication Director or Publications Committee deems inappropriate.
- C. The NAHUC Communication Director and Publications Committee will make a reasonable effort to read all comments posted with the intention to moderate and provide room for real conversations and dialogue to take place. Please support the endeavor to keep NAHUC’s social media websites clean and free of potentially offensive and inappropriate content.

Approved: March 3, 2017	
Revised: Mar 25, 2022	
Reviewed: April 2, 2020; Jun 14, 2021	