

Department Series Report

95: Independent Agencies - Other

Description	Media	Last Updated	In Agency Retention	Rec Center Retention	Disposition	Status
629#:Dirigo Health						
Schedule #: 1670	1#:Dirigo Health Agency Enrollment Applications and Renewal Applications					
.) Enrollment and renewal applications are provided to the Dirigo Health Agency for determining eligibility for insurance and discounts for the DirigoChoice Health Insurance Program. The DirigoChoice Program offers sliding-scale discounts on monthly cost of coverage and deductible/out-of-pocket costs for a comprehensive high quality insurance plan. Additionally, the application may be used to apply for MaineCare. It is necessary to keep the applications because members may voluntarily terminate coverage and at a later period attempt to reenroll in the Program with a discount. The rules governing the Discount Program are specific to eligibility criteria. Notes and forms in the members' files are used to determine if the person reenrolling meets discount eligibility criteria. Additionally, the applications may be used by our Customer Service Staff to address inquiries relative to discount level from previous years, demographic, financial information, primary care physician, and prior insurance information. The typical file may contain a Member Enrollment/Member Change Form, Group Application for Insurance, Group Profile Form, Insurance Vendor Rate Sheet, Individual Certification Statement, Dirigo Health Agency Participation Agreement, DirigoChoice Discount Application, and applicant's financial data, if applicable.	Paper	3/17/2008	Years 1	Years 9	Destroy	Current
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Schedule #: 1894	2#:Income Series - Dirigo Health Agency Funding Source Receipts - Access Surcharge Payment Receipts					
The Access Payment Remittance forms and Check Stubs along with corresponding back-up regarding receipt of payment are retained by the Dirigo Health Agency (DHA). This Funding Source for the DHA was initiated under State of Maine Statute 21-A MRSA 6917. These paper records are retained by DHA as back-up for Internal & State Auditing purposes. The Agency also retains the documentation in order to accurately account for any potential request for a review of what Access Surcharge payments have been received from an Entity. A typical file will contain an Access Payment Remittance Form and a check stub from an Entity from each month since September 2009. A file can also contain paper documents relating to monthly Total Paid Claims and/or Monthly Payment amount, correspondence relating to late submission of an Access Payment. Retain in agency until June 30, 2014 (agency closing).	Paper	1/16/2014	Contingent Upon Event - See Description	0 Years	7	Destroy Current
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Schedule #: 1895	3#:Dirigo Health Agency Board of Trustee Minutes					
Minutes of official meetings of Dirigo Health Agency board of Trustees, as transcribed from secretary's notes or abstracted from recording of meetings and incorporated into the Board files. Keep in agency until close.	Paper	1/17/2014	Variable - See Description	0	No Retention	0 Archives Current