



Health Affairs (HA) and TRICARE Management Activity (TMA) Office Relocation Kick-Off Meeting

August 4, 2010 | 10:00AM–12:00PM

Sky 5, Room 407



PURPOSE

- Provide HA/TMA Records Custodians and/or Records Custodian Alternates with details on their requirements to prepare and coordinate the transfer of Federal records to the new location or to a Federal Records Center (FRC)
- Review relocation project completion timeline, including task suspense dates
- Provide records management subject matter expertise and guidance for properly preparing and relocating Federal records
- Identify the Federal and Department of Defense (DoD) regulations applicable to the transfer of TMA records
- Ensure accountability and security of Federal records during the relocation process

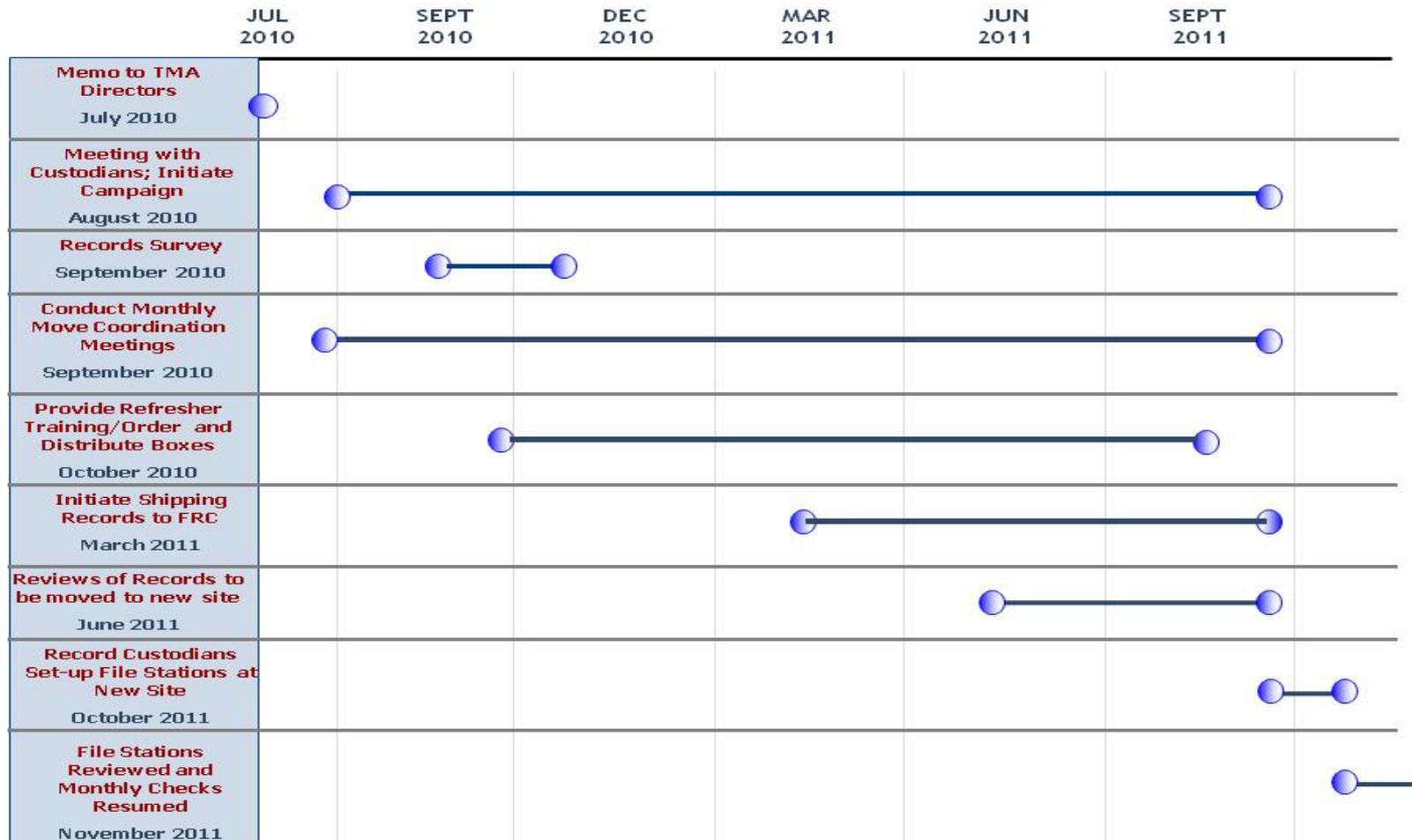


RESPONSIBILITIES

- Records Custodians and Records Custodian Alternates are responsible for preparing and coordinating the transfer of official Federal records to the new office location



TIMELINE



**Timeline subject to change in accordance with updated information received and solidified move timelines*



STEP 1: CONDUCT AN INVENTORY

Conduct an accurate inventory of official Federal records

- Make sure to account for all official records
- Check cabinets, bookcases, and employee desk drawers for official records
- Query all staff members for records that may reside outside the office
- Completed inventory should contain records series numbers, active and inactive records, and reference materials



STEP 2: SORT ACTIVE AND INACTIVE RECORDS

Separate active records from inactive records

- Active records are frequently accessed
- Inactive records are used infrequently, if not at all
- Consult with colleagues to determine the active or inactive status of records
- Records can be recalled from the FRC within 24 hours



STEP 3: DISPOSING OF NON-RECORDS

Dispose of duplicates, reference materials, and non-record information

- Place non-record information into burn bags

IMPORTANT

Because TMA is currently under a number of records freezes, no paper records can be destroyed



STEP 3: DISPOSING OF NON-RECORDS (cont.)

A word about scanning...

- Offices may have concerns about space in the new location
- Some offices may be considering digitizing official records
- NARA has strict requirements for scanning official records
- Due to the records freeze, no office will be permitted to destroy official hard copy records after scanning
- Offices may elect to scan official hard copy records, and subsequently transfer them to the FRC, keeping the electronic copy as a reference
- For clarification: the original hard copy record scanned into the system is considered the official record – the electronic copy of a scanned record is not the official record



STEP 4: ORDER SUPPLIES

Procure Federal records boxes from the supply office

- Boxes come in bundles of 25
- Order boxes ahead of time to avoid rush



STEP 5: DETERMINE THE VOLUME

Determine which records can be shipped to the FRC and which records must be maintained for daily access/use

- What records can be shipped to a FRC?
- What records must be transitioned to the new office location?



STEP 6: PREPARE RECORDS FOR SHIPMENT

Prepare inactive records for shipment to the FRC

- Properly pack all inactive records into FRC boxes
- Prepare an accurate box list
- Coordinate with the TRICARE Records Management Support Team to obtain approval for transfer to FRC



STEP 7: ATTEND MEETINGS

Attend all pre-move training sessions and meetings

- HA/TMA Office relocation informational meetings will be held monthly
- Bring any questions and concerns to the meetings or contact the TRICARE Records Management Support Team as they arise



STEP 8: PREPARE RECORDS FOR TRANSFER

Prepare all records for relocation to the new HA/TMA facility

- Pack and label all records that will be moved to the new site
- Prepare an accurate box list well in advance of the move
- Contact the TMA Records Management Support Team to schedule a review of the records to be moved



STEP 9: SET-UP OFFICIAL FILE STATIONS

Post-move, set up Official File Stations

- Properly label new Official File Stations in the same format currently used
- Properly place hard-copy records into new Official File Stations, in sequential order by record series number and series year
- Identify the location of the records on the Official File Plan



STEP 10: SCHEDULE A RECORDS REVIEW

Contact the TRICARE Records Management Support Team to request a post-move official records review

- The TRICARE Records Management Support Team will provide assistance to ensure new Official File Stations are in compliance with applicable laws and regulations



TIPS FOR SUCCESS

- 💡 Begin planning for the move as early as possible
- 💡 Rid the office of unnecessary, non-record materials
- 💡 Identify and ship inactive records to the FRC
- 💡 Ensure the necessary supplies are on hand
- 💡 Use the tools provided to ensure success



CONTACT

Questions?

We are here to help!

Do not hesitate to contact the

TRICARE Records Management Support Team

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