

HEALTH SERVICE TREATMENT RECORD DISPOSITION AND TRANSFER GUIDELINES STEP BY STEP CHECKLIST

Purpose: Use for all personnel retiring or separating from Naval Service.

Section A - PREPARING RECORDS FOR RETIREMENT

Full Name of Retiring/Separating Member: _____

Command name: _____ Date Separating/Retiring: _____

Identify the health records of the service member retiring/separating

- Medical Record Dental Record VA Claim Submitted Yes No
If yes, what type of claim (BDD or Quick Start)?

Create a copy of the entire medical and dental record

- Medical representative ensures all medical encounters in SAMS and/or TMIP are:
 completed printed placed in the medical
- At least 30 days prior to the retirement, discharge, or end of active obligated service of the active duty member; have member request a copy of all AHLTA notes from local Medical Treatment Facility and Dental Treatment Facility.
- Ask service member if they have ever been seen out in the civilian sector? If yes, check and see if medical evaluation and diagnosis is in medical/dental record. If not, have service member fill out DD877, Request for Medical/Dental Records or Information or DD2870, Authorization for Disclosure of Medical or Dental Information to request a copy of electronic records.
- Collect any of the service member's stray or loose documents and make sure the service member identification information is present on both sides of each page of loose documentation.
- Compile notes from SAMS/AHLTA/TMIP/CHCS I/Essentris and provide a copy of the complete medical and dental record to service member.
- Did member decline a copy of their medical or dental record? If so, draft Memorandum stating "member decline copy" and file with NAVMED 6150/7, Health Record Receipt.

Record Validation

- Take out all AHLTA notes and verify that medical and dental record only contains information pertaining to that service member.

Section B - PREPARING THE RECORDS FOR SHIPPING

- Fill out a DD2963, Service Treatment Record Certification form to certify a complete copy of the medical and dental record to include all known loose documentation.
- Place certification letter inside Medical Record to account for the medical and dental record.
- Send an email to the Branch Health Clinic using the email address provided in COMUSFLTFORCOM 062027Z Mar 14 message (Proper Transfer of STR); provide the POC with the demographics of the person retiring/separating. Make sure to tell them the approved separation/retirement date. The BHC will push the AHLTA notes in HAIMS (Health Artifact and Imaging Management Solution) to Veteran Affairs.

Section B - PREPARING THE RECORDS FOR SHIPPING (cont.)

Documentation

- Remove and document on the NAVMED 6150/7, Health Record Receipt (pink card) their contact information when they retire/separate, tracking number and date record was sent to NMRA. Retain NAVMED 6150/7 for five years.

Section C - MANIFESTING AND SHIPPING

- Create label for shipping.
Mail to: Navy Medicine Records Activity (NMRA), BUMED Detachment St. Louis, 4300 Goodfellow Blvd, Bldg 103, St. Louis, MO 63120
- Package record for shipping.
- Insert folders into the box until the box is full. If you are not shipping enough folders to fill a box, use either Navy Postal or FEDEX container of a size appropriate for your shipment. Do not delay the shipping of records to fill a box.
- Sent via some form of traceable mail, USPS Certified or USPS Return Receipt or via priority mail.

Tracking Information/Number: _____

Return this form to TYCOM Medical within seven days post delivery confirmation.

Date sent: _____

Completed by: _____