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My comments are attached to yours.



**PARTNERSHIP
FOR PUBLIC SERVICE**

Ready to Exit: Checklist for Departing Political Appointees

Version 6 – February 20, 2024

This checklist is designed to help outgoing appointees understand the numerous personal administrative items that must be considered when departing government service. It is important that you are accorded all of your rights and benefits, address your ethics obligations and fulfill your responsibility as a steward of federal funds as you depart your politically appointed position. While there are some commonalities across the federal government, each agency has its own unique checklists based on different statutes and agency regulations. There likely will be a difference in procedures for offboarding appointees who were Senate confirmed, or who were in the Senior Executive Service.

The Partnership compiled these tips from interviews with recent appointees as well as experts in the office of the undersecretary of management as well as assistant secretaries for administration and management at CFO Act agencies. However, the ultimate responsibility for effective offboarding rests with your designated agency experts and you.

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C. Human Resources

1. **Resignation Letters.** Consult your chief human capital officer or White House liaison on the appropriate protocol and format of letters. Your resignation letter may be a public record, so give careful thought to the tone and content of the letter and what you want to say about public service. If your resignation is at the end of a president's term, you may be eligible for unemployment benefits.

2. **Service Computation Date.** Ensure that your service computation date accurately reflects all your federal service (civilian, military or creditable by other statute). A service computation date determines your eligibility for leave, retirement, vesting in the Thrift Savings Plan and as a factor in a reduction in force. It is in block #31 of your SF-50. If you have had multiple tours of federal service, with breaks, it is important that an HR staff member compute your service computation date to account for all your service. It is best to check this date upon returning to service, but vital to do so before you depart in case you are eligible for retirement benefits (such as lifetime health insurance coverage). This was our top tip from recent appointees.

3. **Your SF-50, Notification of Personnel Action.** Print and keep a copy of your SF-50, your electronic Official Personnel Folder and your last earnings and leave statement. The electronic forms may no longer be available once you leave your agency. We recommend you keep it as a permanent record if you ever plan to return to federal service – it confirms valuable employment information that a new hiring office will need to reinstate you.

4. **Benefits.** The federal government offers a wide range of benefits, but you may not be eligible for all of them. It is important to ask what continues after you leave federal service. Here is a list of topics to explore:

- **Leave**
- **Severance Pay**
- **Unemployment Compensation**
- **Health Benefits**
- **Flexible spending accounts (health care and dependent care)**
- **Federal dental and vision benefits**
- **Federal Long Term Care insurance**
- **Life insurance**
- **Retirement eligibility**
- **Retirement contributions**
- **Thrift Savings Plan**
- **Transit Benefits**

5. **Contact Information:** Let HR know how to reach you after you leave: phone, email and mailing address. Take a contact list of the key career contacts who can answer questions after you leave. Do not hesitate to follow up if you have not been paid your last check or your unused leave balance.

D. Records Management

1. Consult with your Records Liaison Office to ensure your official records are identified and preserved, which records you may take with you and which of your materials can be discarded. Allow your RLO and career point of contact access to your online files. Read National Archives and Records Administration [Records](#)



[Management Guidance for Political Appointees](#). This resource defines what a record is and all the types of records you may have created.

2. Allow enough time to review these records prior to your departure – usually three to four weeks in advance. In the rare instances you used your personal email for official government business, you may need time to transfer the records to the official files and you may need time to sort and preserve official government texts on your government phone and online meeting notes.

A. Determine how your agency social media accounts associated with your position will be archived and shut down.

E. **Security, Privacy, IT, Equipment and Gifts**

1. **Security.** Your access to classified national security information and your security clearance ends with your termination from the government and your clearance will be administratively withdrawn. For those with top secret/sensitive compartmented information clearances, you must be debriefed by your chief information security officer or designee. You may not take classified files. Return all access control cards, credentials, badges and other identifying information, such as an official or diplomatic government passport for your position. Be sure to keep a copy of your clearance information from your security office as it is much easier to reinstate an administratively withdrawn clearance (within certain timelines) should you need it in the future for other employment.

2. **Privacy.** Consult your agency's privacy officer on how to properly secure, transfer or destroy any personal identifiable information you may have stored in paper or electronic files.

3. **IT.** Contact IT to determine the next steps on all your accounts on all electronic devices.

4. **Equipment.** Return computer equipment, mobile phones, home monitors, printers, thumb drives, wireless cards and other IT and communication equipment. Disconnect your government account from your personal mobile and other personal devices. Clean out your office and return all non-IT property such as office keys, desk keys, file keys, official flags, seals and photos.

5. **Gifts.** It is very possible that in your position you accepted gifts from visiting dignitaries, foreign partners, colleagues, business associates or others. Each of these gifts should have been noted with your OGE at the time of receipt along with the proper disposition of each gift. As you depart, it's a good idea to verify each gift acceptance disposition before you remove it from your office.

F. **Communications**

1. **Discuss with leadership how your resignation will be communicated to the public.** Will it be by a press release or a notice on the agency's website? Identify key accomplishments you may wish to highlight in a press release if one is required. Draw these from your legacy work in item III.

2. **Say Thank You** to your non-career and career staff for everything they did to help you accomplish the administration's and your goals. You absolutely could not have done it without them.

3. **Farewell letters to internal and external stakeholders.** Check with your CHCO on the appropriate protocol. Include your future contact information if you wish.



Resources: Please see examples of briefings from the Department of Homeland Security and Department of Education who have graciously agreed that we may share them. (we can put links in) And the Department of Labor example in section 3.1 of the [Agency Transition Guide](#).

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