



# Retirement Out-processing Checklist

## For State Department Employees

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### ☐ Retirement Application

- Submit your retirement application through EBIS at least 90 days prior to retirement.
- Respond to follow-up messages from your HR/RET retirement counselor regarding the signature of forms and other matters related to finalizing the application. HR/RET is in Columbia Plaza (SA-1), Room H-620, 202-261-8960.
- Retiring employees may order career achievement (retirement) awards by submitting Form DS-5079 to HR/RET.

### ☐ Bureau or Post Out-processing

- Contact your bureau executive office or embassy management officer for a list of requirements specific to departing that assignment. These include returning government-owned equipment (for example, Blackberry, GO device, protective mask, and government credit card), settling any financial obligations to the government, and returning classified or sensitive documents.
- If desired, download any documents from your eOPF for your own files since your OpenNet access terminates at retirement.
- Employees potentially interested in returning to work as a WAE should update their Employee Profile Plus (EP+) on HR Online prior to retirement to document their experience and skills.

### ☐ Separation Physical

- Foreign Service employees and eligible family members may initiate separation medical examinations 90 days prior to separation and must complete them within 90 days after separation unless they sign a waiver of medical claim. Exams may be done at an embassy health unit, by a private medical provider, or at the MED Exam Clinic in Columbia Plaza (SA-1), Room L-201, 202-663-1779. For additional info, see the MED intranet site under Medical Clearances.
- To obtain copies of your medical records, see the MED intranet site for request procedures.

### ☐ Payroll and Time/Attendance

- For domestic employees, your current bureau will maintain your time and attendance until retirement.
- For State Department Foreign Service personnel returning from overseas assignments to attend the FSI Job Search Program (RV 102), FSI's Career Transition Center will maintain your time and attendance until your retirement/separation. Before you arrive at FSI, complete DS-1707 "Leave, Travel, and Consultation Status" via HR Online and deliver, e-mail, or fax it to your HR/RET counselor for signature. After it is signed, then scan/e-mail it to FSICTC@state.gov, fax it to CTC at 703-302-7416, or deliver it on day one of the Job Search Program.

### ☐ Diplomatic Passports

- Unexpired diplomatic passports must be cancelled at the Passport Services Courtesy Desk in the Employee Services Center, HST Room 1252 (Hours: 9:00 AM-2:45 PM), 202-955-0198.
- However, if you are retiring from overseas without transiting DC, mail your and your family's diplomatic passports with a cover note to Special Issuance Agency, Attn: Communications Section, 1111 19th NW, St 200, Washington, DC 20036. If you want the passport(s) to be returned as a souvenir after they are cancelled, then include a prepaid/preaddressed envelope.

☐ Transit Subsidy Program

-- Domestic employees enrolled in the Transit Subsidy Program must withdraw prior to retirement. Do so via eTransit on HR Online.

☐ Transfer Travel and Shipment of Effects

-- Foreign Service members pending separation travel should review and correct their OF-126 "Foreign Service Residence and Dependency Report" which will be used for final panel action; review their TMONE and submit a travel itinerary to the assignment support unit; and ensure they receive a TMFOUR listing the separation address approximately 30 days prior to retirement.  
-- Foreign Service employees may obtain information on shipment of personal effects at <http://almopsttm.a.state.gov/>. The Transportation Operations Office (A/LM/OPS/TTM/TO) is in SA-3, Suite 5100, 202-663-0891 or 800-424-2947, [TransportationQuery@state.gov](mailto:TransportationQuery@state.gov).

☐ Financial Disclosure

-- Employees subject to financial disclosure requirements must file "termination" reports between two weeks before, and 30 days after, their retirement/separation date. For details, see the intranet site of the Office of Legal Advisor's Office of Ethics and Financial Disclosure.

☐ State Department ID Badge

-- Employees assigned domestically should turn in your State Department ID Badge to your bureau Executive Office on your final day.  
-- Overseas employees who do not transit DC en route to retirement should turn in your State Department ID Badge to your embassy Regional Security Officer or Management Officer.  
-- State Department and USAID personnel who wish to obtain a retiree building pass should complete DS-1838 (in Item 21 under Other specify "Retiree"), obtain a signature from HR/RET, and then go to the DS Badge Unit, Harry S Truman Building, Room B-266, with your passport and domestic drivers license as proofs of identity. Participants of the FSI Job Search Program will receive a pre-signed form during the JSP.

☐ Travel Voucher

-- Employees who travel to their separation address on State Department orders should file a DS-189 travel voucher within seven days of retirement. Send it by fax to 843-746-0725, by e-mail to [GFSCWOEC@state.gov](mailto:GFSCWOEC@state.gov), or by mail to Global Financial Services, Employee Claims, 1969 Dyess Avenue, N. Charleston, SC 29405. Contact [EmployeeClaims@state.gov](mailto:EmployeeClaims@state.gov) or 843-308-5461 with questions or if you need the form. Be sure to sign the voucher, provide a personal e-mail address or contact phone number, and include any pertinent receipts and a copy of your travel orders.

☐ After Retirement

-- Obtain your final W-2 via [www.EmployeeExpress.gov](http://www.EmployeeExpress.gov) which remains available to former employees for 18 months after retirement (must log on every 90 days to stay active).  
-- Annual leave payments are paid 12-14 weeks after the date of separation. A breakdown of the payment will be in Employee Express, formatted as an earnings and leave statement. Send [PayHelp@state.gov](mailto:PayHelp@state.gov) any questions about annual leave payment.  
-- Foreign Service retirees may send [PayHelp@state.gov](mailto:PayHelp@state.gov) questions about their annuity payments.  
-- Civil Service retirees may go to <http://www.opm.gov> for information on post-retirement issues.  
-- Foreign Service retirees should send post-retirement beneficiary changes to [HRSC@state.gov](mailto:HRSC@state.gov).  
-- Foreign Service retirees should sign-up for Annuitant Employee Express once the Office of Personnel Management sends them a PIN after retirement.