

Retirement date: _____

Human Resources Office (HRO) Representative Retirement Package Checklist

Recommendation: HRO representative meet with Soldier 60 to 40 days prior to Final Out Processing date to finalize packet.

Timeline: As a Minimum, the following documents will be forwarded to the Transition Center NLT 30 days prior to Final Out Processing date

NAME: _____ RANK: _____ UNIT: _____

_____ Memorandum – Retirement Application – Approved thru channels

_____ DA 2339 – Retirement Application – Should be done on TRANSPROC if available.

_____ Soldier's Current Contact Information - Address, phone numbers (home & cell) and current email address.

_____ Source Documents for Previous Service (Send all that are applicable for the Soldier)

- a. RPAM (NGB 23b) – Updated – If not validated, include LES for invalidated periods.
- b. DD 214s and DD 215s - for all previous periods of active duty.
- c. NGB 22
- d. DA 220
- e. DA 4187 for any periods of lost time during current period of service

_____ DA 1506 or DA 7301 – Service Computation

_____ DD 2839 – Career Status Bonus (CSB/REDUX) Election (if applicable)

_____ Updated DA 2-1 and Personnel Qualification Record (PQR Jr.) – or – Enlisted Record Brief/Officer Record Brief (ERB/ORB)

- Include Award Documents and DA 1059s for items not updated on DA 2-1/ERB/ORB or in IPERMs.

_____ Initial AGR Tour Order.

_____ Promotion Order to Current Grade (Federal Recognition order for Officer)

- If applicable, promotion order for highest grade held on Active Duty, if different from current grade
- If applicable, any reduction orders during current period of service

_____ DD 93 Emergency Data Card – Updated to reflect information that will be valid for 120 days past the date of retirement.

_____ SGLV Serviceman's Group Life Insurance Form – Updated to reflect information that will be valid for 120 days past the date of retirement.

_____ DD 2648 Pre-Separation Counseling Checklist - Completed during ACAP/TAP

- May be hand carried by Soldier to Final Out-processing.

_____ Medical and Dental Records – or – VA receipt of medical records

_____ Clearance Papers – Either Unit Clearance Memo or DA 137-1-R as required by local Transition Center.

_____ DA 31s – Unprocessed Ordinary Leave, Permissive TDY (PTDY)(if authorized), and Transitional Leave. Leave slips should be complete, signed and with control numbers
(PTDY must be taken before Transitional Leave and must be signed by an O5 or higher)

_____ Retirement Order – Completed in TRANSPROC if available.

SOLDIER ACTIONS FOR RETIREMENT PROCESSING

NAME: _____ **RANK:** _____ **UNIT:** _____

Initials	Date	Document/Action Required	Required By	Timeline
		Application for Retirement - Memo through Channels - DA 2339	State & Transition Center	Up to 12 months prior to retirement date
		Updated Retirement Point Accounting Statement (NGB 23b)	State & Transition Center	At time of application
ACAP/TAP NOTE: Verify with your Transition Center if ACAP is required instead of TAP				
		DD Form 2648 - Retirement Briefing/Transition Orientation	Transition Center	Up to 24 months prior to retirement date
MEDICAL				
		Phase I Retirement Physical – Done by Military Treatment Facility (MTF)	State & Transition Center	Timeline will be determined by local installation policy
		Phase II Retirement Physical – Either by MTF or through VA program	State & Transition Center	Timeline will be determined by local installation policy
		Medical & Dental Records or Verification of completion of VA program <i>(IF NO VERIFICATION OF COMPLETION OF PHYSICAL or VA PROGRAM PARTICIPATION – OUT PROCESSING STOPS!!)</i>	State & Transition Center	Must be turned in at Final Out Processing at Transition Center
SURVIVOR BENEFIT PROGRAM				
		DD Form 2656 - Survivor Benefit Briefing completed at Transition Center <i>(MANDATORY BEFORE FINAL SIGNING OF DD 214)</i>	Transition Center	Up to 120 days prior to final out processing to be determined by local Transition Center Policy
PERSONNEL RECORD REVIEW				
		Verify all prior service Statements of Service - DD 214, NGB 22, DA 220, etc	State & Transition Center	NLT 90 days prior to final out processing
		Federal Awards – Updated - ie. Good Conduct Medal, ARCOM, etc	State & Transition Center	NLT 90 days prior to final out processing
		SGLV Form – Updated with S-1 - Information must be valid for 120 days past retirement date.	Transition Center	NLT 90 days prior to final out processing with updates provided until final out processing
		DD 93 – Updated with S-1 - Information must be valid for 120 days past retirement date.	Transition Center	NLT 90 days prior to final out processing with updates provided until final out processing
		Update 2-1 & Personnel Qualification Record (PQR) or Enlisted Record Brief / Officer Record Brief (ERB/ORB)	State & Transition Center	NLT 90 days prior to final out processing
		Unit Clearance Memo – or – DA 137-1-R	Transition Center	NLT 40 days prior to final out processing
FINANCE / HUMAN RESOURCES OFFICE				
		DA 31s for any unprocessed ordinary leave, Permissive TDY (PTDY), and Transitional Leave - Any PTDY after Final Out-processing must be in conjunction with and prior to Transitional Leave - Incremental PTDY (if authorized) will be taken prior to Final Out processing	State & Transition Center	30 days prior to final out processing with updates to Transition Center as needed *NOTE: PTDY MUST be used BEFORE transitional leave
		Retirement Orders - MINIMUM of 12 COPIES or # dictated by Transition Center	Transition Center	Must be turned in at Final Out Processing

Congratulations on reaching your retirement! REMEMBER to safeguard your DD Form 214. The copies you receive are the ONLY originals that exist. This is the most vital document you will receive from the Army!