

ACT NOW EDUCATION

FREE Comprehensive educational resources and opportunities for Veterans, Military and their families.

Military Transitioning & Retiring Plan Checklist

3 years – 1 year out

- ☐ Accrue 60 days of leave (max 120 until 09/30/23)
- ☐ Financial prep/saving (3 months of pay or more)
- ☐ Credit Score review/inaccuracy removal
- ☐ Life Insurance, Will, and Testament
- ☐ Children college
- ☐ Military Cool/CA (industry certifications)
- ☐ Initial Counseling (IC) Before 365
- ☐ Pre-separation counseling (Spouses/Caregivers)
- ☐ LinkedIn (Build your network before you need it) If you don't have one. My network is your network. Connect with me. <https://www.linkedin.com/in/jai-salters/>
- ☐ Portfolio-class portrait

+ 12 Months Out

- ☐ 1st TAP (3 Days) www.dodtap.mil
- ☐ My Transition Workshop
- ☐ MOS/RATING Crosswalk
- ☐ DoL Workshop (3 Days)
- ☐ VA Benefits Workshop
- ☐ Two-DayTracks (Emp, Voc, Edu, SBA)
- ☐ Look into Skillbridge opportunities <https://skillbridge.osd.mil/>
- ☐ Build resume www.hiringourheroes.org/
- ☐ Get a Mentor (ACP) www.acp-usa.org
- ☐ Upskilling ACT NOW Free Coursera certs/courses <https://actnoweducation.org/freecoursera>

Medical Records Prep

- ☐ Over 40 Physicals
- ☐ Document everything! Sleep Study?
- ☐ Patient Records (30 Days via mail)
- ☐ Outpatient records, Surgical records, Radiology, X-Rays on disk (same-day service)
- ☐ Make 2x copies of your records

Register for VA eBenefits

- ☐ Get a DS login password
- ☐ Burn pit registry <https://veteran.mobilehealth.va.gov/AHBurnPitRegistry/#page/home>

+ 10 Months Out Personnel Office

- ☐ Intent to Retire memo
- ☐ Request for Vol. retirement
- ☐ Leave form (Terminal & PTDY)
- ☐ Get your:
 - ☐ Retirement Orders
 - ☐ Installation Clearance Record

+ 8 Months Out

Retirement Ceremony Planning virtually through Zoom/Teams for COVID or in-person

- ☐ Select and reserves venues
- ☐ Guest list, invitations, and base access
- ☐ Book hotel rooms
- ☐ Request Officiating Officer, Master of Ceremonies
- ☐ Bio & agenda, Flowers/gifts, Catering/Reception
- ☐ Take pictures with family in uniform

7 Months Out

- ☐ 2nd TAP Brief (3 Days)
- ☐ VA Physical *Disability determination after retirement* 30% equals a 15-point hiring advantage. Find a Rep (DAV, VSO or VFW)

6 Months Out

- ☐ Create a username/password for My Pay while you still have a CAC login.
- ☐ Skillbridge program
- ☐ Job Industry Mentorship www.veterati.com
- ☐ Benefits Delivery at Discharge (BDD) Program <https://www.va.gov/disability/how-to-file-claim/when-to-file/pre-discharge-claim/>

Retirement Service Office. Personnel officer will provide packet and schedule

- ☐ Mandatory Retirement Brief
- ☐ Mandatory Survivor Benefit brief
- ☐ SBP Election Appointment
- ☐ Review Final DD form 214/Signatures
- ☐ Retirement Ceremony

3 Months Out Final Out + Permissive TDY

- ☐ TDY (20 Days) ICW terminal leave Or
- ☐ (5+5+5+5) then 10 regular duty days + 2 Days final out

2 Months Out

- ☐ Terminal Leave (60 Days)
- ☐ Get pre-certified for the Veteran Tax Credit at www.veterantaxcredits.com

1 Month Out

- ☐ VGLI or Private Insurance (SLGI Ends)
- ☐ Dental enrollment
- ☐ Register Self/Family for Tricare Prime or Select
- ☐ File PTDY Voucher with DFAS

Retirement ID Card

- ☐ DD214 (make Sure it's correct)
- ☐ Copy of Orders

Transportation

- ☐ Transportation will move HHG up to 1-year post-retirement + Multiple extensions
- ☐ Check your state and local veteran tax laws

Lastly, your final paycheck on ActiveDuty will likely NOT be directly available, nor paid on the pay cycle prior to separation/retirement please plan accordingly.