

Documents to Gather and Things to Do NOW

What documents should I gather?

Some federal employees have recently faced sudden departures from the workplace and/or restrictions on returning to the workplace. Under those circumstances, there is little to no opportunity to download important personal documents.

Federal employee unions have strongly recommended working now to prepare a file with the following documents that pertain solely to you and emailing them to a personal email account or downloading and printing a hard copy to take home:

- Where available to you, your complete electronic personnel record, sometimes known as the “eOPF”. This file must be accessed from an authorized government account.
- A copy of your current position description.
- Your most recent Earnings & Leave (E&L) statements.
 - If available, E&L statements for the last five years or year-end summaries for the past five years.
- Records showing your enrollment in federal benefits plans such as the Federal Employee’s Health Benefits Plan (health insurance).
- Completed Designation of Beneficiary forms.
- Any summary of your current government benefits available to you.
- Any summary or analysis of your accrued pension benefits, e.g., that which might be available through the Government Benefits Platform (GRB) or Foreign Service Pension System (FSPS) Benefits Statement.
- Most current Leave Summary from your Time & Attendance system.
- W-2 statements from at least the last five years.
- Performance appraisals or evaluations from at least the last five years.
- If you have travelled OCONUS or been vetted to do so, the most recent medical clearances for self and family.
- Award certificates and citations.
- Public (unclassified) contact information (email address and phone number) for your agency HR team, including your retirement office.
- Public (unclassified) contact information for pre-publication review, alumni offices or groups, unions, security operations centers
- Downloaded list of professional contacts.

Unions have also suggested employees do the following to be prepared in case of a sudden departure:

- Remove personal documents from your work computer(s), especially those that you may need to access later and/or those which contain personal information and data.

- Make sure you can access sites protected by login.gov credentials (e.g., FSAFeds) without your government credentials, such as your PIV/CAC card, by adding your personal email and phone numbers to your login.gov profile.
- Make sure important accounts and profiles (e.g., Thrift Savings Plan, medical insurance, professional liability insurance, etc.) are linked to your personal email account and phone numbers, not your government ones.
- Consider obtaining professional liability insurance (PLI).
- Familiarize yourself with the restrictions of the Hatch Act and Anti-Lobbying Act on your communications with Members of Congress.
- Contact your HR service providers to 'buy back' creditable service toward your retirement computation date / retirement eligibility (e.g., Peace Corps service, previous service in other civil service agencies, military service).
- Consider putting a freeze on your credit, to prevent your personal identifying information (PII) being used to open accounts in your name.
- Learn how to file a Privacy Act Request at your agency in case you need to request additional information about you which is maintained by your agency.