



ADMINISTRATIVE COMMUNICATIONS SYSTEM  
U.S. DEPARTMENT OF EDUCATION

# DEPARTMENTAL DIRECTIVE

OM:3-104

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*Distribution*  
All Department of Education Employees

*Approved by:* \_\_\_/s/ (by David McAlpine)\_\_\_\_\_  
Chris Marston  
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## Clearance of Personnel for Separation or Transfer

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For technical questions concerning information found in this directive, please contact Colleen Lanza on (202) 401-3136 or via [email](#).

Supersedes OM: 3-104, Clearance of Personnel for Separation or Transfer dated 09/14/2004.

## I. Purpose

This Directive establishes procedures and responsibilities for the clearance of all employees who separate or transfer from the U.S. Department of Education (ED).

## II. Policy

It is the policy of ED that all employees who separate or transfer from ED will be properly cleared of any and all obligations to ED.

## III. Authority

- o 5 USC 5514 (recovery of debt);
- o 5 USC 4108 (employee training agreements);
- o 5 USC 5724 (travel and transportation recoverable as a debt to the United States);
- o 40 USC 483(b)(1) (property management);
- o 18 USC 701 (unauthorized use of official ID cards);
- o Executive Order 12968 (debriefing of individuals serving in sensitive positions);
- o 44 USC 33 (employees may not remove Federal records and must request approval to remove non-record documentary materials);
- o [OCFO:3-104 Government-wide Commercial Purchase Card Program](#) Section VII Part F;
- o [Handbook OCFO-01 Handbook for Information Assurance Security Policy](#) Section 4 Part 4.1.5;
- o [Handbook OCFO-05 Handbook for Travel Policy](#) Section VI: Part A;
- o [OM:3-103 Identification Media \(Credentialing\)](#) Section VII Part F;
- o [OM:6-103 Records and Information Management Program](#) Section VI;
- o [OM:2-102 Transit Benefits Program](#) Section V Part B and Appendix C;
- o [OM:3-105 Health Benefits Coverage For Employees In Non-Pay Status](#);
- o [PMI: 537-1 \(07/26/2002\) Repayment of Federal Student Loans](#) Section VII Part C and Section VIII Part E;
- o [PMB 575-3 \(05/04/1991\) Relocation Bonuses](#) Section VII Part Section B;
- o [PMB575-2 \(05/04/1991\) Recruitment Bonuses](#) Section VII Part Section B;
- o [PMI: 630-2 \(5/13/1991\) Annual Leave](#), and
- o [PMI: 630-3 \(3/06/2002\) Sick Leave](#).

## IV. Applicability

The provisions of this Directive apply to all employees who separate or transfer from ED.

## V. Definitions

- A. **Active Duty:** The term “active duty” means duty under a call or order to active duty under a provision of law referred to in section 101(a)(13)(B) of title 10, United States Code.

- B. Agency Official:** The person designated by the agency having authority to certify employee's release from financial and property obligations as well as from access to official computer networks and databases and information.
- C. Cardholder:** A Cardholder is an ED government employee, education boards, commissions, and councils to whom a Purchase Card is issued. He or she receives a written delegation of authority to purchase goods or services for ED specifying spending and usage limitations. Some Cardholders may also hold a contracting warrant.
- D. Clearance Personnel:** The individuals designated on the Clearance of Personnel for Separation or Transfer (ED Form EP-2), who are authorized to certify that the employee has or has not been released from obligations for items under the control of that office.
- E. Clearance Points:** The offices that are functionally responsible for maintaining the records and files that must be reviewed in order to certify employee release from financial and property obligations as well as from access to official computer networks and databases.
- F. Contracting Warrant:** A contracting warrant is an appointment in writing on a SF-1402, Certificate of Appointment, which states any limitations to a warrant holder's purchasing authority, other than those stipulated in law or regulation. Some individuals with a contracting warrant may also have a Purchase Card.
- G. Separating Employee:** Any employee who is leaving the employment of the Federal Government (including Cooperative Education Students, summer employees, excepted appointees, temporary and term employees, Senior Executive Service, Schedule "C" appointees, and staff of Presidential Advisory Councils) via resignation, expiration of appointment, termination, removal, retirement, death, and other personnel action relative to separation. The separating employee will be called "employee" in this directive.
- H. Transferring Employee:** An employee who moves from ED to another agency (with or without a promotion) without a break in service of one full workday. The transferring employee will be called "employee" in this directive.

## VI. Responsibilities

### A. Supervisors of Separating or Transferring Employees

1. Supervisors will ensure that the Executive/Administrative Office (EO) is informed that the employee is leaving, will give official release date for transferring employees (or date of resignation for separating employees), and will ensure that the employee is informed by the EO on the process for initiating the clearance procedure at least two weeks prior to the separation (Note: special procedures for death, absent employees and involuntary separations is covered in Section VII.).
2. As part of the clearance process, the supervisor will ensure that the employee has returned all equipment or other materials not specifically monitored by other offices which the employee has obtained from the organization (such as desk or office keys). The supervisor

is responsible for ensuring that all official records, whether paper or electronic are appropriately archived and/or disposed of, and signs the ED Form EP-2 clearing the employee from the above mentioned obligations and verifying that all signatures have been obtained.

## B. Employees

The employee is responsible for completing the ED Form EP-2, returning any applicable government property and making restitution for any debt owed to ED. Please note: Federal Student Aid (FSA) employees will follow established procedures for Separating/Transferring Employees, which may vary slightly from this directive. Please see FSA website <http://thestartingline.ed.gov/myworkplace/index.html> for more information.

The Employee will:

1. Notify the supervisor upon making a decision to separate, usually one to two pay periods before separating from the Federal Government or transferring to another agency, in which the Office of Management (OM) Human Resources Services (HRS) arranges for a release date.
2. Report to the EO immediately to begin the clearance process (recommend starting the ED Form EP-2 signature process two weeks before last day). The employee will have all designated blocks checked and all signature blocks signed on the ED Form EP-2. The points of contact for each of the blocks can be found on ConnectED under the [Exit Clearance Package](#). Once complete, the employee will sign and date on the final certification block and return to EO.
3. Personally make arrangements for restitution in instances where indebtedness is involved with transit benefits ([OM:2-102 Transit Benefits Program](#) Section V Part B and Appendix C).
4. Make arrangements to return the following or make restitution (if applicable) for the following. See the following ED documents:
  - [Repayment of Federal Student Loans](#);
  - [Relocation Bonuses](#);
  - [Recruitment Bonuses](#);
  - [Identification Media \(Credentialing\)](#);
  - Telephone Calling Cards;
  - Travel Cards - [Handbook for Travel Policy](#);
  - Purchase Cards [Government-wide Commercial](#) and [List of Current Cardholders](#)
  - Contracting Warrant Certificates of Appointment (SF-1402) - [ED Acquisition Certification Program For Contracting Professionals](#);
  - [Transit Benefits](#);
  - Communication Devices (cell phones, pagers, etc.); and
  - All Government Property.

5. On last day of employment, return all remaining property, equipment and material; such as desk keys, identification card (ID), parking permit, and mobile devices issued by ED.
6. Return Purchase Cards and/or Contracting Warrant Certificates of Appointment (SF-1402) issued by the Office of the Chief Financial Management Operations (OCFO) Contracts and Acquisitions Management (CAM) as soon as possible (if applicable).
7. Headquarters employees - return Travel Cards to Financial Management Operations (FMO) in OCFO. If the employee is in a field/regional office, return the Travel Card (by mail and cut in half) to either the EO/Admin Officer or directly to (FMO).
8. Return library books/materials to ED's Library before/by the last day of employment (if applicable).
9. Not make any attempt to access ED network (EDNet) and/or applications/systems, once the employee has left ED (consequences for accessing any computer system may result in legal charges and/or fines).
10. Follow applicable ethics guidance provided by the Office of General Counsel (OGC).
11. Not remove unauthorized documents and materials (see [OM:6-103 Records and Information Management Program](#) and [Exit Clearance Package](#) Information and Forms Number section 14).
12. Employees in regional and field offices may fax ED Form EP-2 for appropriate signatures.

NOTE: Separating/Transferring Employees who are also supervisors shall prepare a supervisory input document for each employee supervised, in accordance with PMI 430-2 Education Department Performance Appraisal System (EDPAS), prior to their departure.

### **C. Executive/Administrative Office (EO)**

Principal Office's EO in Headquarters, and the Administrative Office of each component in the Regional Offices will assist the employee in the separation process.

Upon notification from the appropriate supervisor and contact with the employee, the EO will:

1. Prepare and forward to OM/HRS the appropriate Request for Personnel Action (SF-52) for the employee who is separating/transferring from ED.
2. Print the ED [Exit Clearance Package](#) materials from ConnectED and forward the ED Form EP2 to the employee to initiate clearance at least two weeks before the proposed separating date (Note: special procedures for death, absent employees involuntary separations, and separating Active Duty service members are covered in Section VII.).
3. Inform the employee of the requirement to complete the clearance procedures and that the consequences of failing to do so, could result in the initiation of deductions from the employee's salary and/or delay processing the separation or transfer.

4. Ensure that all employment-related obligations such as advanced leave balances, travel advances, tuition reimbursements, recruitment incentives are properly cleared;
  - a. through an interview with the employee,
  - b. by check of EO records, and
  - c. by communication with clearance points listed on the ED Form EP-2, to ensure that all obligations are cleared.
5. Inform the employee of the opportunity to complete the [exit questionnaire](#) located on ConnectED and/or an exit interview with HRS.
6. Inform the employee of the procedure for a mandatory interview with OM/Security Services, if the employee is in a sensitive position.
7. Notify the Principal Office (PO) Information Technology (IT) coordinator to initiate the IT Account Termination process for the employee. Notify other responsible parties to terminate all other non-network IT accounts (e.g. EDCAPS, FPPS, CPSS, UNIX, VPS).
8. Notify the employee of his/her responsibility for reimbursing ED for unused transit benefits [OM:2-102 Transit Benefits Program](#) Section V Part B and Appendix C.
9. Notify the employee's payroll coordinator prior to the employee's last day at ED.
10. Notify HRS if the clearance process will not be satisfactorily completed. This serves as notification to ED to place a "hold" on an employee's final salary or lump sum annual leave check, if applicable.
11. Notify the payroll processing section in the Department of the Interior (DOI), by memorandum (email), to release the employee's final salary check and lump-sum payment for annual leave, when the clearance process has been satisfactorily completed.
12. Ensure that the employee has obtained all signatures on the ED Form EP-2. Ensure that the supervisor has signed the form to certify that everything has been completed.
13. Send a notice via e-mail to the Travel Card Agency Program Coordinator located in FMO advising of the termination/separation. Direct Headquarters employees to return the travel card to FMO, for regional employees, EO will collect and return travel cards to FMO.
14. Collect the ID card of employees placed in a non-work status (i.e., LWOP), as well as from employees on their last workday, and send the recovered ID card to OM/Security Services (OM/SS) for disposition [see [OM:3-103 Identification Media \(Credentialing\)](#)].
15. Discuss how former employees/retirees obtain copies of their last Leave and Earnings statements and how to access online Employee Express services.
16. Inform the employee on benefits, accessing Official Personnel Files and other post employment information.

17. Collect and sign the ED Form EP-2 from the employee once all signatures have been obtained.

#### **D. Principal Office Information Technology (PO IT) Coordinator**

PO IT Coordinator will:

1. Fill out and submit an Account Termination Form (ATF) [04-06] and send to the [helpdesk@ed.gov](mailto:helpdesk@ed.gov) in the Office of the Chief Information Officer (OCIO) as soon as informed by the EO of the employee's intent to separate, and no later than (2) business days before the departure of the employee.
2. Input on the ED Form EP-2, the following:
  - a. The date that the ATF [04-06] was sent;
  - b. Actual termination time and date;
  - c. A checkmark in the box to indicate that all Network Access has been terminated;
  - d. Date and signature.
3. Print and attach the OCIO issued email, verifying that the account access has been terminated, to the ED Form EP-2.
4. Inform EO of necessary action to terminate all other non-network IT accounts (e.g. EDCAPS, FPPS, CPSS, UNIX, VPS).

#### **E. Office of Management/Human Resources Services (OM/HRS)**

OM/HRS will:

1. Update this directive as needed.
2. Update the forms and applicable information on the connectED site and maintain hard copies of updated clearance packages in the event of a system access failure. See-[Exit Clearance Package](#).
3. Conduct exit interviews and/or collect surveys with employees leaving ED and counsel employees as appropriate.
4. Concur with ED procedures for the collection of overpayments.
5. Generate/Release Personnel Actions SF-52s and SF-50s and personnel forms and records.
6. In the event a clearance process will not be satisfactorily completed, HRS will process a "reroute net" of the last paycheck.
  - a. HRS will enter into the DOI Federal Personnel Processing System (FPPS) [Tables/Reroute/Code P-Reroute to Payroll Operations Division], no later than Tuesday noon after the pay period in which the employee separates.

- b. To cancel the “hold” of the final salary pay, the EO must contact HRS no later than the Tuesday following the close of the affected pay period.

#### **F. Office of the Chief Financial Officer (OCFO)**

OCFO will:

1. Coordinate with Financial Management Office (FMO) to review records ensuring that the employee is free of all [Travel Card](#) obligations to ED through the Financial Systems Operations (FSO) upon request of the EO, Supervisor or Separating Employee.
2. Sign off on ED form EP-2, and inform the EO of any outstanding Travel Card obligations before or on the last day of the employee’s regular employment with ED. See the Handbook for Travel Policy for detailed information on payment requirements.
3. Coordinate with Contracts and Acquisitions Management (CAM) to certify that the:
  - a. [Purchase card](#) has been returned to CAM.
  - b. Purchase card account is closed with the Purchase Card Contractor.
  - c. Sign off on ED Form EP-2, and inform the EO on reconciliation of any outstanding purchase card transactions received before the Cardholder has left ED.
  - d. Contracting Warrant Holders have returned their Certificate of Appointment when issued by CAM (SF-1402).

#### **G. Office of the Chief Information Officer (OCIO)**

OCIO will:

1. Terminate employee’s access to official computer networks and database through the Account Termination Form submitted to the [helpdesk@ed.gov](mailto:helpdesk@ed.gov). This is in accordance with [Handbook OCIO-01 Handbook for Information Assurance Security Policy](#).
2. Email verification to PO IT Coordinator, to verify that system access has been terminated.

#### **H. Office of the General Counsel (OGC)**

OGC will:

1. Sign off on ED Form EP-2 and inform the EO of any litigation holds or ethics issues.
2. Provide [Post-Employment Ethics](#) briefings if applicable, and sign ED Form EP-2.

#### **I. OM/Security Services (SS)**

OM/SS will:

1. Review security records to ensure that the employee is free of all obligations to ED.



2. Sign off on ED Form EP-2 and inform the EO of any outstanding obligations before the last day of the employee's regular employment with ED, see [OM:3-103 Identification Media \(Credentialing\)](#) Section VII Part F.

#### **J. OM Regulatory Information Management Services (RIMS)**

RIMS will:

1. Review and approve or disapprove requests for removal of documentary materials by Presidential appointees and conduct records management exit briefings. Requests must be submitted using the Documentary Materials Removal/Non-Removal Certification Form See the Removal of Documentary Materials by Presidential Appointees or Department Employees procedures on ConnectED for more information about the documentary material removal process.
2. Sign off on ED Form EP-2, and inform the EO of any disapproved requests for removal of documentary materials by Presidential appointees and all other employees. Conduct records management exit briefings.

#### **K. Principal Offices (PO)**

POs, including those listed above, that have ACS Directives, Policies Bulletins, Memos and Standard Operating Procedures linked to this directive will:

1. Regularly update all requirements and changes that directly affect the Separation/Transfer clearance processes.
2. Inform OM/HRS Policy office of changes affecting this directive.

## **VII. Special Procedures for Deaths, Absent Employees, Active Duty & Involuntary Separations**

Procedures for clearance in cases of deaths, absent employees, active duty and involuntary separations are different only to the extent described below. Outstanding indebtedness in such cases will be handled in the same manner as in all other cases.

#### **A. Deaths**

When an employee dies, the EO will initiate the Clearance Form and will be responsible for determining what property had been entrusted to the employee and what debts are outstanding. The EO will inform OM/HRS Employee Relations Team of the clearance status promptly so that the indebtedness, if any, and the method of collection can be explained to the family at the time the family is counseled on survivor benefits.

#### **B. Absent Employees**

When an employee resigns or retires via email or telephone, the employee will be instructed to return any outstanding property to the EO. The employee will also be informed that any

outstanding debt not resolved will result in a levy being placed on the final salary payment or retirement refund check.

**C. Active Duty**

The Uniformed Services Employment and Reemployment Rights Act (USERRA), prohibits discrimination against persons because of their service in the Armed Forces Reserve, the National Guard, or other uniformed services. When an employee reports for active duty in the uniformed services (even if the employee **chooses to separate** from ED), he/she will, in most cases, have return rights to ED. During uniformed service, the employee may not be demoted or separated (other than military separation). EOs must notify the employee of his/her rights, obligations, and benefits relating to Government employment (see [OM:3-105 Health Benefits Coverage for Employees in Non-Pay Status](#)). Often the employee may not have orders allowing two weeks to complete the exit process. In such cases the EO and supervisor will assist with the military separation process. EOs have the responsibility for collecting the ID card of employees placed in non-work status (LWOP), for employees on their last workday, and for sending the recovered ID cards to OM/SS for disposition [see [OM:3-103 Identification Media \(Credentialing\)](#)].

**D. Involuntary Separations**

In cases where an employee is separated under adverse action procedures or during probation, the EO will not issue the Clearance Form to the employee, but will initiate the form and, in coordination with the supervisor, will ensure that all necessary clearances are obtained prior to the employee's final day in duty status.

### Employee Separation Process

It is the policy of the ED that all employees who separate or transfer from ED are properly cleared of all obligations. Employees should begin the process **two weeks** prior to his/her separation date. Employees should review the [Exit Clearance Package](#) to locate the point of contact list for names and phone numbers to assist him/her through the process. Employees will need to clear through each of the clearance points on the ED Form EP-2. Each block must be signed by the designated official. If an employee has an outstanding obligation, the employee should notify the appropriate office listed below to personally make arrangements for reparation. **Please note: Federal Student Aid (FSA) employees will follow established procedures for Separating/Transferring Employees**

<i>Item #</i>	<i>Headquarters Clearing Unit</i>	<i>Bulletins, Policies and Directives</i>
1	Executive Office/Administration, Payroll, Supervisor Return: Office Equipment Office/Desk Keys Library Materials Calling Cards Supervisor has Completed EDPAS for Subordinates Benefits USERRA Federal Health Benefits & Return Rights	See Office Policies and Procedures <a href="#">OM:3-105 Health Benefits Coverage For Employees In Non-Pay Status</a>
2	Office of the Chief Information Officer (OCIO) Access Termination Form [04-06] (Email/Network)	<a href="#">Handbook OCIO-01 Handbook for Information Assurance Security Policy</a> Section 4 Part (4.1.5.)
3	Office of Management (OM) Security Services (SS) ID Badge Passports	<a href="#">OM:3-103 Identification Media (Credentialing)</a> Section VII Part F
4	Office of the General Counsel (OGC) Litigation Holds Post Employment Ethics	Post- <a href="#">Employment</a> Ethics Memorandum
5	Office of the Chief Financial Officer (OCFO) Financial Management Office (FMO) –EDCAPS Access Financial Systems Operations (FSO)- Travel Cards Contracts Acquisitions Management (CAM)-Purchase Cards and Warrant Certificates of Appointment	<a href="#">OCFO:3-104 Government-wide Commercial Purchase Card Program</a> Section VII Part F <a href="#">Handbook OCFO-05 Handbook for Travel Policy</a> Section VI: Part A ED Acquisition Certification Program for Contracting Professionals
6	Office of Management (OM) Management Services (MS) Transit Benefits	<a href="#">OM:2-102 Transit Benefits Program</a> Section V Part B and Appendix C
7	Office of Management (OM) Regulatory Information Management Services (RIMS) Removal of Documentary Materials	<a href="#">OM:6-103 Records and Information Management Program</a> Section VI Parts C-L and procedures posted on Connect ED.
8	Office of Management (OM) Human Resource Services (HRS)- Repayment for: Leave Advances Student Loans Relocation Incentives Recruitment Incentives  Exit Questionnaire	<a href="#">PMI: 630-2 (May 13, 1991) Annual Leave</a> <a href="#">PMI: 630-3 (March 6, 2002) Sick Leave</a> <a href="#">PMI: 537-1 (07/26/2002) Repayment of Federal Student Loans</a> Section VII Part C and Section VIII Part E, <a href="#">PMB 575-3 (05/04/1991) Relocation Bonuses</a> Section VII Part Section B, <a href="#">PMB575-2 (05/04/1991) Recruitment Bonuses</a> Section VII. Part Section B <a href="#">Exit Questionnaire</a>

\* NOTE: Field Employees should contact their supervisor and/or administrative officer for clearance procedures.

Clearance of Personnel for Separation or Transfer (ED Form EP-2)			
Name of employee (Last, First, and Middle Initial)			
Forwarding address		Name of organization	
		Building and room #	Office Phone #
		Home Phone #	
Reason for separation			
<input type="checkbox"/> Resignation <input type="checkbox"/> Transfer to another Federal Agency		<input type="checkbox"/> Retirement <input type="checkbox"/> Involuntary separation <input type="checkbox"/> Other (specify) _____ <input type="checkbox"/> Military Other _____	
Date SF 52 initiated	Date of separation	<input type="checkbox"/> Position sensitive	<input type="checkbox"/> Position non-sensitive
<b>Employee Obtains Signatures</b> Appropriate action must be taken to obtain clearances in the areas shown below. <b>Please note: Federal Student Aid (FSA) employees will follow established procedures for Separating/Transferring Employees</b> <i>Do NOT check boxes until clearances are obtained unless marked N/A.</i>			
<b>1. PAYROLL – Designated Office Payroll Specialist</b> 1) <input type="checkbox"/> N/A <input type="checkbox"/> Advanced annual leave (# of hours _____) Amount Owed: \$ _____ 2) <input type="checkbox"/> N/A <input type="checkbox"/> Travel advances 3) <input type="checkbox"/> N/A <input type="checkbox"/> Advanced sick leave (# of hours _____) Amount Owed: \$ _____ 4) <input type="checkbox"/> N/A <input type="checkbox"/> Training agreements 5) <input type="checkbox"/> N/A <input type="checkbox"/> Service agreements 6) <input type="checkbox"/> N/A <input type="checkbox"/> Overpayments (e.g., Salary Overpayments)			
Comments: Signature: _____ Date: _____			
<b>2. SECURITY SERVICES –Office of Management</b> 1) <input type="checkbox"/> N/A <input type="checkbox"/> Security determination ((CIS) Access Clearance Holder debriefed) 2) <input type="checkbox"/> N/A <input type="checkbox"/> Special ID Pass Comments: Signature: _____ Date: _____			
<b>3. OGC – Office of the General Counsel</b> 1) <input type="checkbox"/> N/A <input type="checkbox"/> Litigation Holds Comments: Signature: _____ Date: _____ 2) <input type="checkbox"/> N/A <input type="checkbox"/> Ethics Obligations and Post Employment Briefing/Memo Comments: Signature: _____ Date: _____			
<b>4. FINANCIAL SERVICES – Contracts and Acquisitions Management</b> 1) <input type="checkbox"/> N/A EDCAPS Access – Terminated <input type="checkbox"/> Yes <input type="checkbox"/> No (FSO)Signature: _____ Date: _____ 2) <input type="checkbox"/> N/A Travel Card – Travel Card Returned to FMO <input type="checkbox"/> Yes <input type="checkbox"/> No Amount Owed \$ _____ (FMO)Signature: _____ Date: _____ 3) <input type="checkbox"/> N/A Purchase Card – Returned <input type="checkbox"/> Yes <input type="checkbox"/> No 4) <input type="checkbox"/> N/A Contracting /Warrant Holder- Warrant Certificate of Appointment (SF-1402) Returned <input type="checkbox"/> Yes <input type="checkbox"/> No – ( Note: FSA issued Warrant Certificate of Appointment <b>may not</b> be returned to CAM) (CAM) Signature: _____ Date: _____			
<b>5. TRANSIT BENEFITS – Office of Management</b> 1) <input type="checkbox"/> N/A <input type="checkbox"/> Transit Benefits Cards Returned Amount Owed \$ _____ Comments: Signature: _____ Date: _____			

**6. REGULATORY INFORMATION MANAGEMENT SERVICES (RIMS)- Office of Management**

- 1)  Yes  No – Presidential Appointee
- 2)  N/A  Removal of Documentary Materials by Presidential or Departmental Employees determined by Program Records Official.

Comments:  
 (Program Record Official) Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**7. HUMAN RESOURCES SERVICES – Office of Management**

Staffing Specialist

- 1) Exit interview  Yes  No
- 2) Completed [exit questionnaire](#)  Yes  No

Comments:  
 Staffing Specialist Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**9. SUPERVISOR – Must be completed and signed by last day.**

1) I verify that that the employee has returned all equipment or other materials not specifically monitored by other offices, which the employee has obtained from the organization (such as desk or office keys). I ensure that all official records, whether paper or electronic are appropriately archived and/or disposed of. I verify that all applicable signatures have been obtained.

Comments:  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**10. PRINCIPAL OFFICE INFORMATION TECHNOLOGY (PO IT) COORDINATOR-**

PO IT coordinator initiated and submitted Account Termination Form [04-06] to OCIO on, Date: \_\_\_\_\_

Proposed Termination Date: \_\_\_\_\_ Proposed Termination Time: \_\_\_\_\_ (e.g., COB 4:30 PM)

Network Access Terminated (check box and attach email verification notice)

Comments:  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(Sign once account access has been terminated.)

**10. EXECUTIVE /ADMINISTRATIVE OFFICE –Must be cleared and completed by last day and submitted to HRS.**

- 1)  SF-52 Complete (forwarding address and reason for leaving )
- 2)  N/A  Parking Permit
- 3)  N/A  Office Property (Communication devices, laptops, etc.)
- 4)  N/A  Telephone Calling Cards
- 5)  N/A  Keys
- 6)  N/A  Library Materials
- 7)  Account Termination Form Initiated [04-06] within 2 business days by IT coordinator
- 8)  Collect ID Card
- 9)  N/A  Passport
- 10)  N/A  Supervisor Completed EDPAS for subordinates.
- 11)  Benefits Overview
- 12)  N/A  USERRA Benefits & Return Rights

Comments:  
 Employee cleared all items. Arrangements have been made for the employee to make restitution for monies owed.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Certification**

11. **EMPLOYEE-** Must be completed, signed and returned to IPO IT Coordinator by the last business day in ED. I understand that if I have outstanding obligations to the Department, that have not been satisfied before my last day of employment, that my final paycheck and lump sum annual leave will not be released. I also understand that my retirement fund may be offset. (5 U.S. Code 5514). I will not make any attempt to access the Department network (EDNet) and/or ED applications/systems (e.g., EDCAPS) or remove unapproved documentary materials, once I have left the Department.

Signature of Employee: \_\_\_\_\_ Date: \_\_\_\_\_