

Official Personnel Folder (OPF) Retirement Review Checklist

Use this checklist 6–12 months before your planned retirement date to help ensure your personnel records are complete and accurate.

This checklist is intended to help you review your Official Personnel Folder before retirement. It does not replace guidance from your agency's Human Resources office or the Office of Personnel Management (OPM).

Employment History

Completed	Task
☐	Review your SF-50s for your entire federal career.
☐	Verify your appointment date.
☐	Confirm all promotions are documented.
☐	Verify reassignments and position changes.
☐	Check that your retirement coverage is correct (FERS, CSRS, or other).
☐	Confirm your current position and grade are accurate.

Creditable Service

Completed	Task
☐	Review your federal service history for completeness.
☐	Confirm prior federal employment is documented.
☐	Verify breaks in service are accurately reflected.
☐	Verify military service documentation is included, if applicable.
☐	Confirm military service deposit records, if applicable.

Pay Records

Completed	Task
☐	Review records of grade increases.
☐	Verify within-grade increases.
☐	Confirm promotions and pay adjustments are documented correctly.

Insurance and Benefits

Completed	Task
☐	Review your FEHB enrollment history.
☐	Review your FEGLI records.
☐	Verify other benefits elections maintained in your personnel records.

(see page 2...)

Beneficiary Designations

Completed	Task
☐	Review beneficiary designation forms.
☐	Update forms after major life events.
☐	Confirm emergency contact information is current, if maintained.

Personal Information

Completed	Task
☐	Verify your legal name.
☐	Confirm your date of birth.
☐	Review your Social Security Number for accuracy.
☐	Verify your mailing address, if applicable.

Missing Documents

Completed	Task
☐	Look for missing SF-50s.
☐	Confirm required supporting documentation is included.
☐	Identify any gaps in your employment history.
☐	Make a list of records needing correction.

Before You Submit Your Retirement Application

Completed	Task
☐	Contact your Human Resources office about missing or incorrect records.
☐	Keep copies of important personnel documents.
☐	Verify corrections have been completed.
☐	Save a copy of your final eOPF, if permitted.

Notes
