



This document must be completed 365 days prior to you ending Active Duty orders if you have served 180 days or more,  
IAW Section 1142 of Title 10 USC, Pre-Separation Law.

## TRANSITION ASSISTANCE INITIAL SELF-ASSESSMENT WORKSHEET

### SECTION A. SERVICE MEMBER INFORMATION

INSTALLATION: Peterson AFB Unit: \_\_\_\_\_

NAME: \_\_\_\_\_ DOD ID: \_\_\_\_\_ DATE OF SEPARATION: \_\_\_\_\_

WORK EMAIL: \_\_\_\_\_@us.af.mil PERSONAL EMAIL: \_\_\_\_\_

WORK PHONE: \_\_\_\_\_ DOB: XXXXPIIXXXX AGE: \_\_\_\_\_ CELL PHONE: \_\_\_\_\_

HOW MANY YEARS OF SERVICE \_\_\_\_\_ GENDER: \_\_\_\_\_

### SECTION B. DEMOGRAPHICS

Service Branch: USN ☒ USAF USMC USA USCG Reserve Component (RC) Affiliation: Guard Reserve

Pay Grade: E1-E5 E6-E7 E8-E9 O1-O3 O4-O6 O7-O10 O1-CWO5 Rank: \_\_\_\_\_

Rate/Designator/MOS/AFSC: \_\_\_\_\_

Marital Status: Single Married (check if spouse is employed) Widowed Divorced Separated Children# \_\_\_\_\_

Highest Level of Education: (GED/HS, Associates, Bachelors, Masters, Doctorate, Post-Graduate): \_\_\_\_\_

Concentration: \_\_\_\_\_

### SECTION C. DISCHARGE

### PROJECTED CHARACTERIZATION OF DISCHARGE

A Certificate of Release from Active Duty (DD 214) will determine re-employment rights and eligibility for benefits. They are not automatically generated for reservists.

Retiring 20+ Years ☐ Yes ☒ No

Medical Retirement ☐ Yes ☒ No

Medical Separation ☐ Yes ☒ No

Voluntary Separation ☐ Yes ☒ No

Involuntary Separation\* ☒ Yes ☐ No

Administrative Separation ☐ Yes ☒ No

Demobilization ☐ Yes ☒ No

\*Reserve members put on AD then released from AD shall be considered an involuntary separation (Sec 1141, Title 10 USC)

Honorable

Honorable Conditions (General)

Other than Honorable

Bad Conduct

Dishonorable

Dismissed

Uncharacterized

Unknown (DD 214 is not yet processed or Reserve member has not requested one)

### SECTION D. CIVILIAN EMPLOYMENT & EDUCATIONAL ENROLLMENT HISTORY

Do you have employment outside of the Military? Yes No I'm not pursuing other employment at this time as part of my family/long term plan

Will your employment outside the Military be available after this upcoming set of AD orders/Deployment? Yes No N/A

If Yes; Employer name: \_\_\_\_\_ Your work email & phone number: \_\_\_\_\_

Are you/will you be enrolled in school prior to going on this upcoming set of Active Duty orders/Deployment? Yes No N/A

Will you continue enrollment in school while on this upcoming set of Active Duty orders/Deployment? Yes No N/A

### SECTION E. PERSONAL GOALS

I'm a Reservist and plan to return to part time [TR/IMA/DSG] full time [ART/AGR/ANGT] employment in the military.

I'm a RegAF member and am am not interested in continuing military service in the reserve component at this time.

What are your post-separation short-term goals?  
Explain:

\_\_\_\_\_

What are your post-separation long-term goals? I'm interested in a: reserve active duty military retirement, and/or a civilian retirement.  
Explain:

\_\_\_\_\_

## SECTION F. FACTORS

### FAMILY LIFE AND RELOCATION PLAN:

- |  |     |                                     |   |
|--|-----|-------------------------------------|---|
| 1. Are you leaving the military at the end of this AD order?   | Yes | No                                  | Unsure                                  |
| 1a. If so, do you plan to relocate after leaving the military? If Yes, where? _____  |     | No                                  | <input checked="" type="radio"/> Unsure |
| 2. Do on-line cost of living calculators indicate that there is a higher cost-of-living there?<br><small>Here's one example -- <a href="https://www.bankrate.com/calculators/savings/moving-cost-of-living-calculator.aspx">https://www.bankrate.com/calculators/savings/moving-cost-of-living-calculator.aspx</a></small> | Yes | <input checked="" type="radio"/> No | Unsure                                  |
| 3. Do you anticipate having a support system in place? e.g., Family, Friends, Mentor, Transportation, Housing  | Yes | No                                  |   |
| 4. Does the thought of leaving the military create stress on you or your family?   | Yes | No                                  | N/A<br>at this time                     |

### FINANCIAL PLAN:

- |  |                           |                          |                           |
|--|---------------------------|--------------------------|---------------------------|
| 1. Have you initiated a 12-month projected post transition budget?   | Yes                       | No                       | N/A                       |
| 2. Have you started planning for your retirement? (e.g. TSP, IRA, 401K)  | Yes                       | No                       | N/A                       |
| 3. Do you have emergency savings (two weeks-pay/\$1000)?   | Yes                       | No                       | N/A                       |
| 4. Do you have adequate cash set aside to cover 3-6 months of living expenses?   | Yes                       | No                       | N/A                       |
| 5. Have you considered additional family expenses? (childcare or child support)  | Yes                       | No                       | N/A                       |
| 6. Have you calculated the impact of renting vs. buying during your transition period?   | Yes                       | No                       | N/A                       |
| 7. Do you know how much you would have to earn, pre-tax, to equal your BAS and BAH?<br><small>Find out now by typing in your grade and years of service! <a href="https://militarypay.defense.gov/Calculators/RMC-Calculator/">https://militarypay.defense.gov/Calculators/RMC-Calculator/</a></small> | Yes                       | No                       | N/A                       |
| 8. Have you reviewed your vehicle(s) payment, insurance and taxes?   | Yes                       | No                       | N/A                       |
| 9. Have you reassessed insurance needs? (medical, exceptional family member, dental, life)   | Yes                       | No                       | N/A                       |
| 10. Have you reviewed your credit report in the last 4 months?   | Yes                       | No                       | N/A                       |
| 11. Do you have an up-to-date will and/or power of attorney?   | <input type="radio"/> Yes | <input type="radio"/> No | <input type="radio"/> N/A |

## SECTION G. TRACKS

### EMPLOYMENT PLAN

- |   |                                      |    |                                      |
|---|--------------------------------------|----|--------------------------------------|
| 1. Do you plan to work after leaving the military?                            | <input checked="" type="radio"/> Yes | No |                                      |
| 2. Do you have a confirmed job offer (for after you get out of the military)? | Yes                                  | No | <input checked="" type="radio"/> N/A |
| 3. Do you have an updated resume?   | <input checked="" type="radio"/> Yes | No |                                      |
| 4. Do you plan on staying in your current career field?                       | <input checked="" type="radio"/> Yes | No |                                      |
| 5. Would you like more information on employment?                             | <input checked="" type="radio"/> Yes | No |                                      |

### EDUCATION PLAN

- |  |                                      |                                     |
|--|--------------------------------------|-------------------------------------|
| 1. Do you plan to enroll in continuing education or do you have enrollment confirmation? | Yes                                  | <input checked="" type="radio"/> No |
| 2. Do you have a professional license(s)/certificate(s)?                                 | Yes                                  | No                                  |
| 3. Would you like more information on education?   | <input checked="" type="radio"/> Yes | No                                  |

### ENTREPRENEURSHIP PLAN

- |   |                                      |                                     |
|---|--------------------------------------|-------------------------------------|
| 1. Do you currently own a business?                                     | Yes                                  | <input checked="" type="radio"/> No |
| 2. Do you intend to start your own business after leaving the military? | Yes                                  | <input checked="" type="radio"/> No |
| 3. Do you have a business plan?   | Yes                                  | <input checked="" type="radio"/> No |
| 4. Would you like more information on entrepreneurship?                 | <input checked="" type="radio"/> Yes | No                                  |

### VOCATIONAL PLAN

- |  |                                      |                                     |
|--|--------------------------------------|-------------------------------------|
| 1. Have you attended a trade school?                             | Yes                                  | <input checked="" type="radio"/> No |
| 2. Do you have a technical or trade license(s)/certification(s)? | Yes                                  | <input checked="" type="radio"/> No |
| 3. Would you like more information on trades?                    | <input checked="" type="radio"/> Yes | No                                  |

## Useful Tools/Links:

Determine civilian salary equivalent to your (Active Duty) regular military compensation (RMC) - [militarypay.defense.gov/calculators/RMC-Calculator](http://militarypay.defense.gov/calculators/RMC-Calculator)

Determine your Social Security Entitlements, and more, using Social Security Administration (SSA) calculators - [ssa.gov/planners/calculators](http://ssa.gov/planners/calculators)

Access your Thrift Savings Plan (TSP) account for up-to-date figures - [tsp.gov/index](http://tsp.gov/index)

Calculate your federal government retirement savings - [tsp.gov/planningtools/calculators/how savings grow.html](http://tsp.gov/planningtools/calculators/how savings grow.html)

### \*Minimum required items per DoDI 1332.35

### Helpful Facts to Prepare for Transition

## Budget Template

Category & Items	EXAMPLE	Member Entries
<b>Assets</b>	<b>Amount</b>	<b>Amount</b>
Property (Real Estate, jewelry, etc)		
Investments (Mutual Funds/CDs, etc)		
Retirement Plan (IRA/TSP/401K)		
Savings (Emrg/Reserve/Goal Getter)		
Interest		
Other		
<b>Total Assets*</b>	0	<b>1</b>
<b>Monthly Household Income</b>	<b>Amount</b>	<b>Amount</b>
Spouse's salary (or Alimony/Child Support)	2000	
<b>Member's Salary*</b>	3600	<b>2</b>
<b>Total Household Income</b>	3600	
<b>Monthly Expenses</b>	<b>Amount</b>	<b>Amount</b>
<b>Mortgage/Rent*</b>	1000	<b>3</b>
<b>Healthcare*</b>	250	<b>4</b>
<b>Transportation/Car Loan*</b>	150	<b>5</b>
<b>Taxes*</b>	300	<b>6</b>
<b>Childcare/Daycare*</b>	87	<b>7</b>
<b>Food*</b>	250	<b>8</b>
<b>Life Insurance*</b>	13	<b>9</b>
<b>Auto Insurance*</b>	800	<b>10</b>
<b>Property Insurance*</b>		<b>11</b>
Utilities	150	
Bills/Debts	0	
Savings	400	
Other		
<b>Total Monthly Expenses* Liabilities</b>	3400	<b>12</b>
<b>Income vs. Expenses</b>		
<b>Item</b>	<b>Amount</b>	<b>Amount</b>
Total Monthly Household Income	3600	
Total Monthly Expenses	3400	
<b>Difference</b>	200	

### Comparing Military Benefits Available Based on Status

Title 10 orders vs Reserve Status  
 Service Mbr Civil Relief Act vs Military Lending Act  
 IRS- no extension deadline vs Armed Forces Legal Assistance  
 Military Lending Act vs Armed Forces Legal Assistance

Military Compensation vs Non-Taxable Pay  
 Taxable vs Non-Taxable Pay  
 Base Pay vs BAH  
 CONUS COLA vs BAS  
 Clothing Allowance vs OCONUS COLA  
 DLA vs DLA  
 FSA vs FSA  
 Per Diem vs Per Diem  
 TLA vs TLA

Calculated Net worth (assets-liabilities)	
Calculated Debt-to-Income (DTI) ratio %:	

(DTI= Total Monthly Expenses / Pre-tax income) <= 33% acceptable to lenders  
 <= 34 – 49% lenders use more eligibility factors, <= 50% lenders see you as a financial risk

## Airmen & Family Readiness Office (A&FRO) Opt-Out Budget Statement

I am electing to not complete/submit the Budget Worksheet provided by the Airmen & Family Readiness Office. I confirm that I have an existing budget, employment and/or resources available to maintain my household without any monetary assistance from the military or government. I understand that by electing to opt-out and not submitting a budget, I will be referred to, and must speak with, a Personal Financial Counselor.

Typed/Printed name: \_\_\_\_\_ Digital/Wet Signature: \_\_\_\_\_

# Individual Transition Plan (ITP) & Budget

Determine Category of Separation/Discharge (pick A or B)  
☒ A) Leaving Active Duty and returning to Reserve Status  
☐ B) Leaving the Military

Per Title 10 § 1141, A1, A2, B1 and B2 are all considered "Involuntary" Separations  
☐ (A1) end of orders ☐ (A2) end of deployment/mobilization  
☐ (B1) Administrative ☐ (B2) Medical ☐ (B3) Retirement

Full Name: \_\_\_\_\_ Anticipated Transition Date: \_\_\_\_\_

Rank: \_\_\_\_\_ Gender: \_\_\_\_\_ Highest Level of Education: \_\_\_\_\_ Secured Employment: \_\_\_\_\_

Ret/Sep: \_\_\_\_\_ Military Status: \_\_\_\_\_ Character of Discharge (projected): \_\_\_\_\_

Date member last reviewed Credit Report (recommended to have been in last four months): \_\_\_\_\_

Date member registered for eBenefits (see attached print screen/proof): \_\_\_\_\_

## Section I. Identify Post-transition Personal/Family Requirements

### A. Taking Care of Individual/Family Member Needs

- ❖ **HEALTHCARE** (medical care, mental health care, expenses, and location of potential providers)

Mental Health Services: <https://www.va.gov/health-care/health-needs-conditions/mental-health/>  
<https://www.pdhealth.mil/resources-center/intransition>  
<https://www.militaryonesource.mil/health-wellness/mental-health/mental-health-resources>

- ❖ **CURRENT HOUSING EXPENSES/POST TRANSITION HOUSING PLAN.** How much living space you will require to house yourself, dependents, and personal items. The installation transportation office can provide detailed information about planning the movement and storage of your household goods. Visit the VA website: <http://www.benefits.va.gov/homeloans/> to get information on the VA home loan.

- ❖ **RELOCATION COSTS.** Assess impact of individual/family requirements on relocation options (e.g. quality of local schools, availability of medical care, spouse employment opportunities, etc.).

- ❖ **EXCEPTIONAL FAMILY MEMBER PROGRAM (EFMP)** (e.g. **Do you need to provide care for elderly parents, family business, exceptional family member (EFMP) needs, etc.**). Identify them here.

- ❖ **TRANSPORTATION.** Do you have adequate reliable personal transportation to take you to and from your place of employment or school? Identify purchase costs, vehicle registration, insurance, maintenance, fuel, etc. If disabled, determine if you are eligible for assistance in purchasing a vehicle and/or automotive adaptive equipment. Visit <https://www.va.gov/disability/eligibility/special-claims/automobile-allowance-adaptive-equipment/>

- ❖ **PEER SUPPORT.** What person or persons do you go to for advice, personal counsel and/or mentoring when facing a difficult challenge or decision? Will you still have access to those persons after you separate from active duty? Consider what steps you need to take now to maintain contact.

## B. Assessing Benefits and Entitlements

- ❖ Evaluate the benefits (e.g. additional income, promotions, leadership and professional development opportunities, travel) associated with continuing your military service in either the Reserves or National Guard (if applicable). Consider the financial impact of continued entitlements such as medical/dental coverage, life insurance, Exchange, Commissary, recreational and athletic facilities. Contact the installation/ local recruiter to schedule an informational counseling session and identify potential units/positions.

Explain: x This member, already affiliated with ARC, will return to the entitlements associated with ARC status.

Recruiter counseling date: N/A; this member is already ARC affiliated Financial impact: N/A

- ❖ Register for your **VA** Benefits and assess their impact on future financial obligations: [www.ebenefits.va.gov](http://www.ebenefits.va.gov)

Explain: All members, regardless of reason for separation MUST complete this.

Date registered for eBenefits: \_\_\_\_\_

Only complete below two fields if you have applied for a disability with the Veterans Administration.

Date applied for Disability: \_\_\_\_\_

Projected Disability Rating: \_\_\_\_\_

## C. Getting Financially Ready

- ❖ Date you reviewed your free credit report (<http://www.annualcreditreport.com/>): \_\_\_\_\_
- ❖ Identify anticipated financial obligations such as dependent college savings plan, retirement savings plan, utility security deposits, and additional commuting/transportation expenses (e.g., additional car payment, fuel, maintenance, insurance). Members returning to Reserve status should identify if they will return to existing civilian employment or being a student or if they will only pursue part time reserve work at this time (and if so, whether or not their spouse has employment and/or if their family plan requires member to NOT pursue additional work). This may have already been identified on the member's self-assessment form.

Explain: All members, regardless of reason for separation MUST complete this.

See simple budget which includes minimum requirements (11 data points), ICW 8.1.(a)(1)(b) of DoDI 1332.35, Transition Assistance Program (TAP) for Military Personnel. "Military Services will accept any transition financial spend plan that includes" these minimums. My Family Readiness Staff has informed me that they are more than happy to provide me more financial planning services, or refer me to the Personal Financial Readiness specialist, if I would like.



## Section II. Evaluate Military and Civilian Experience and Training

### Prior civilian employment:

- ❖ \_\_\_\_\_
- ❖ \_\_\_\_\_
- ❖ \_\_\_\_\_

### List your top 3 Military Occupation Code(s) and Title(s):

(You can see all AFSCs you've had by viewing your VMET at <https://milconnect.dmdc.osd.mil/milconnect/protected/portlet/dodtap>.)

- ❖ \_\_\_\_\_
- ❖ \_\_\_\_\_
- ❖ \_\_\_\_\_

#### A. Documenting Job Related Training

- ❖ Gather documentation of your civilian and military experience/training (e.g., certifications, diplomas, transcripts, licenses, etc.) and list them below. This may require research on your behalf to contact former technical training and academic institutions to identify their specific procedures and any applicable fees for providing this service.

- ❖ \_\_\_\_\_ • \_\_\_\_\_
- ❖ \_\_\_\_\_ • \_\_\_\_\_
- ❖ \_\_\_\_\_ • \_\_\_\_\_

- ❖ Identify and document transferable credits earned through your military experience and training and verify your eligibility for licensure, certification and apprenticeship programs:

Department of Labor Workforce Credentials Information Resource Center	<a href="https://www.careeronestop.org/FindTraining/Types/certifications.aspx">https://www.careeronestop.org/FindTraining/Types/certifications.aspx</a>
Defense Activity for Non-Traditional Education Support (DANTES)	<a href="http://www.dantes.doded.mil/EducationPrograms/index.html#GetCredit">http://www.dantes.doded.mil/EducationPrograms/index.html#GetCredit</a>
Community College of Air Force (CCAF)	<a href="https://www.airuniversity.af.edu/Barnes/CCAF/">https://www.airuniversity.af.edu/Barnes/CCAF/</a>
U.S. Air Force Credentialing Opportunities On-Line (COOL)	<a href="https://afvec.us.af.mil/afvec/Public/COOL/">https://afvec.us.af.mil/afvec/Public/COOL/</a>
U.S. Army Credentialing Opportunities On-Line (COOL)	<a href="https://www.cool.army.mil">https://www.cool.army.mil</a>
Army, Coast Guard, Marines, or Navy - Joint Services Transcripts (JST)	<a href="https://jst.doded.mil">https://jst.doded.mil</a>
Navy Credentialing Opportunities On-Line (COOL)	<a href="https://www.cool.navy.mil">https://www.cool.navy.mil</a>

#### B. Identify career field(s) you are qualified to enter.

- ❖ Conduct personal research to explore and evaluate potential career field options.

Note: Any Guard or Reserve member facing employment difficulty prior to or after an active duty tour can contact Employer Support of the Guard and Reserve ([ESGR.mil](https://esgr.mil)) to learn their legal rights. ESGR will work to resolve conflicts or misunderstandings between the member and their employer.

State Job Boards	<a href="https://www.careeronestop.org/jobsearch/findjobs/state-job-banks.aspx?frd=true">https://www.careeronestop.org/jobsearch/findjobs/state-job-banks.aspx?frd=true</a>
Department of Labor	<a href="https://www.dol.gov/veterans/findajob">https://www.dol.gov/veterans/findajob</a>
Teaching Opportunities/Troops to Teachers	<a href="http://www.proudtoserveagain.com">www.proudtoserveagain.com</a>
Federal Employment Opportunities	<a href="http://www.usajobs.gov/">http://www.usajobs.gov/</a>
Veterans Preference in Federal Employment	<a href="https://www.opm.gov/policy-data-oversight/veterans-services/vet-guide-for-hr-professionals/#2">https://www.opm.gov/policy-data-oversight/veterans-services/vet-guide-for-hr-professionals/#2</a> , <a href="https://www.fedshirevets.gov/">https://www.fedshirevets.gov/</a>
Hiring Preference in Non-Appropriated Funds (NAF)	<a href="http://www.nafjobs.org/preferences.aspx">http://www.nafjobs.org/preferences.aspx</a>
State Employment Agencies	<a href="https://www.careeronestop.org/JobSearch/FindJobs/employment-agencies.aspx">https://www.careeronestop.org/JobSearch/FindJobs/employment-agencies.aspx</a>

### Section III. Determine Post-transition Career Path

#### A. Designate the career field you wish to pursue based on your personal, family and financial obligations and desires.

Desired Career Field (*You may enter your current Reserve Job here*): \_\_\_\_\_

Desired Relocation Destination: \_\_\_\_\_

#### B. Designate your transition career path.

❖ Select the transition career path you wish to pursue. Use the statements below each path to help you determine the appropriate transition career path.

☐ Employment

- I am qualified to seek immediate employment in my desired career field or I plan to explore future employment opportunities or I already have secured employment (includes employment in AF Reserve).

☐ Education

- I require additional education in my desired career field.

☐ Vocational Training

- I require additional technical training in my desired career field.

☐ Entrepreneurship

- I desire to start my own business.

**Tier Designation (assigned by TAP Counselor):**

**This member's needs will be addressed by pathway/Tier 1**