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RECORDS MANAGEMENT CHECKLIST FOR DEPARTING SENIOR LEADERS
(AE Reg 25-400-2)

Employee name	Grade

Organization	Office symbol

Last duty day (YYYYMMDD)	Reason for departing

NOTE: The organization records manager (RM) or command records administrator (RA) will complete this form at least 5 workdays before the senior leader departs.

ID	Question	Yes	No	Comments
1.	Has the unit RM or the command RA and the security manager been contacted for guidance?	☐	☐	
2.	Have official records been separated from personal records?	☐	☐	
3.	Have duplicates, superseded or obsolete directives, and outdated meeting notices and notes been eliminated?	☐	☐	
4.	Is there any correspondence or briefings given to the Executive Office of the President? If yes, have they been separated?	☐	☐	
5.	Have all remaining documents been organized by topic and classification according to the established office record list categories in the Army Consolidated Records Schedule and in chronological order?	☐	☐	
6.	Have unclassified records been reviewed and has approval been requested to copy and remove personal files?	☐	☐	
7.	Have eligible classified records been disposed of in accordance with guidance from the security manager?	☐	☐	

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Employee name	Grade

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ID	Question	Yes	No	Comments
8.	Has coordination been made and an SF 135 been completed for all files eligible for transfer to the Publications and Records Center of Excellence for long-term storage?	☐	☐	
9.	Has information management personnel been authorized to provide the successor access to e-mail messages and electronic records or to obtain the senior official's e-mail messages?	☐	☐	
10.	Has a request been submitted to the command information officer to review visual information material and approve its removal (if applicable)?	☐	☐	
11.	Has a CD with a personal contact list and the personal calendar (without attachments) been created for the successor?	☐	☐	
12.	Has coordination been made with the Military History Institute, U.S. Army Heritage and Education Center, to donate personal papers?	☐	☐	

	Date (YYYYMMDD)	Signature
Employee		
Records Manager/ Administrator		