

APPENDIX I – Transition Plan Template

TRANSITION PLAN

A Transition Plan helps the transition process in the workplace by clarifying roles, steps, and timelines for anticipated completion of identified actions. Transitioning employees, contractors, interns, fellows, or grantees and their supervisors are encouraged to work collaboratively to develop a common roadmap for everyone. The plan should be tailored to meet the needs of individual users and their particular office(s). Some sections may not be applicable to all transitioning individuals or appropriate to the organizational structure of a particular office. Therefore, all sections are optional, and depending on individual circumstances, some may not be applicable. This plan is intended to serve as a guide and is not a contractually binding agreement.

Name*:

Legal Name (if different):

Pronoun(s):

Gender for all personnel records:

Date of notification of transition:

Direct Supervisor(s) to be notified:

**Date of Direct Supervisor(s)
notification:**

Direct Supervisor to be notified by:

OICR Contact:

Date of OICR Consultation:

The Rest of the Transition Support Team

Identify important contacts that will support the transition process at NOAA

**Line Office EEO/Diversity Program
Manager:**

OCAO Contact:

OHCS Contact:

*refers to the employee, contractor, intern, fellow, or grantee

Transition Milestones

Identify milestones that may be important for office planning and support. Examples may include name change, medical leave, etc.

<u>Milestone</u> <i>(If Applicable)</i>	<u>Timing</u> <i>(Date or Season)</i>	<u>Support Needed</u>
Name Change		
Legal Name Change		Official Court documents needed for this process (provide to Office of Security and Office of Human Capital Services)
Email Address Update		Line Office's or Staff Office's IT Office or NSDesk (1-855-673-3751)
NOAA Directory Update		On-line submission
Name Plate Update		Office Administrative Support Staff/Facilities
Business Cards		Office Administrative Support Staff
Facilities Availability		Office of the Chief Administrative Officer (Facilities)
Medical Leave		Office Administrative Support Staff
Voicemail		Office Administrative Support Staff
Benefits		Office of Human Capital Services; Employee Benefit
Badge Update		OCAO; DEERS & TASS Project Manager
Personnel File		Office of Human Capital Services

Optional Notifications

Will the individual's* coworkers be notified?

Who is responsible for notifying coworkers?

Date of initial coworker notification(s):

*refers to the employee, contractor, intern, fellow, or grantee

Date of training for coworkers, if applicable:

Do stakeholders need to be told of a new name or pronoun?

Who is responsible for notifying stakeholders?

Date of initial stakeholder notifications:

Record Keeping

The employee is required to provide the following documentation for record changes:

The date by which the individual* will provide documentation:

Date by which NOAA will ensure that all records will be changed to reflect the employee's accurate name, pronoun, and gender, subject to any approval and processing necessary by OPM:

The individual* may modify this plan at any time by notifying the supervisor and OICR contact.

*refers to the employee, contractor, intern, fellow, or grantee