

# Retention Incentive Checklist

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

UNIT: \_\_\_\_\_ HRO Coordinator: \_\_\_\_\_ DSN: \_\_\_\_\_

## Validate Employee Eligibility –

**A retention incentive may be paid to an employee who would be likely to leave for a different position in the Federal service when-**

- The employee is in a General Schedule (GS) or Non-GS; Tenure 1 or 3; and
- The employee's official performance appraisal is at least "Fully Successful"; and
- The employee is in a pay status

## Coordinator – See Retention Nomination Form & Service Agreement Templates

- Agency has a retention incentive plan consistent with 5 CFR 575.307(a).

### **Determine and document:**

- The basis for determining the agency has a special need for the employee's services that makes it essential to retain the employee, based on the agency's mission needs and the employee's competencies.
- The basis for determining in the absence of a retention incentive, the employee would be likely to leave for a different position in the Federal service; and
- The basis for determining the incentive amount (not to exceed 25% of annual rate of basic pay multiplied by number of years in the service period); and
- The length of the required service period (from 6 months to 4 years); and the timing of the incentive payments (bi-weekly or single lump sum payment after completion of full service period).
- The nomination/justification form includes the items required. (5 CFR 575.306)
- The service agreement includes the items required and employee signs the service agreement.
- TAG approves the incentive; NGB/A1 reviews for compliance with policy & law before payment begins.

## Case Documents –

### **Case must include employee's:**

- Nomination/Justification Form with TAG signature of approval
- Current Official Performance Appraisal at least "Fully Successful"
- Current signed Service Agreement (if applicable)
- Send the case to NGB/A1PF A1 Technician Org Box: [usaf.jbanafw.ngb-a1.mbx.a1-technician@mail.mil](mailto:usaf.jbanafw.ngb-a1.mbx.a1-technician@mail.mil)
- SF50 (send to A1PF org box after processed)