

OVERVIEW: Your Self-Assessment/Individual Transition Plan is your road map for attaining your employment, education, vocational, and entrepreneurial goals and will help you make a successful transition to civilian life. Develop your plan, keeping in mind this is a living document that will be modified as you near transition. As part of your transition, there are [Career Readiness Standards \(CRS\)](#) that you will be required to meet. CRS are designed to increase your ability to successfully overcome any challenges in pursuit of your post-transition goals. This document is a Career Readiness Standard (CRS), and will be required during your **Initial Counseling**, [TRS Workshops](#), and [Capstone Review](#) appointments so make sure you bring it with you to each of these appointments. **CRS are noted throughout the document.**

SECTION A: SERVICE MEMBER INFORMATION

Name: Enter your name.

Gender: Enter your gender.

Marital Status: Select an item. # Children: Enter number of children.

Installation: Enter installation name. Unit: Enter unit name.

Branch of Service: Select your Branch. Component: Select your Component.

Years of Service: Enter YOS. Rank: Select your rank.

Anticipated Type of Discharge: Select your type of discharge.

Anticipated Character of Discharge: Select your character of discharge.

Anticipated Disability: Select whether you anticipate receiving VA disability rating.

Highest Level of Education: Select highest level of education attained.

SECTION B: TRANSITION DATES

Anticipated EAS Date: **Select EAS date.**

Anticipated Terminal Leave Date (if known): Select Terminal Leave start date.

Step 1: Initial Counseling/Pre-Sep Counseling Due Date (EAS date - NLT 365 days): Select date 365 days prior to EAS date.

Step 2: Transition Readiness Seminar (TRS) Due Date (EAS date - NLT 180 days): Select date 180 days prior to EAS date.

Step 3: Capstone Review Due Date (EAS date - NLT 120 days): Select date 120 days prior to EAS date.

Step 4: Commander's Verification Due Date (EAS date - NLT 90 days): Select date 90 days prior to EAS date.

SECTION C: PERSONAL ASSESSMENT

1. **What are your short-term goals?** (between now and 1 year after Transition)

- Enter your short-term goals.

2. **What are your long-term goals?** (after 1 year of Transition)

- Enter your long-term goals.

Register on eBenefits (CRS)

1. Visit [eBenefits](#) and [register](#) for a DS Logon Premium Account for access to personalized benefits and information that allows you to log in to multiple VA and DoD websites and apps using a single username and password. A DS Logon Level 2 (Premium) Account is required before you can view personal information in VA and DoD systems.
2. Date completed: Select the date you registered for your DS Logon Premium Account.

Individual/Family Insurance Considerations

1. Have you identified individual/family needs (e.g. as medical care, dental expenses, location of potential providers, exceptional family member needs, care of elderly parents, etc.) Yes No
2. Visit www.healthcare.gov to evaluate costs of health insurance.
3. Explore options for Life Insurance and/or Survivor Benefit Plans.
4. Visit [MilitaryOneSource](#), [VA Vet Centers](#) or [DoD inTransition](#) Program for information on confidential mental health services.

Your Individual/Family Insurance Consideration Notes:

- Enter your notes regarding individual/family healthcare needs.

Post-Transition Housing and Relocation Considerations

1. Do you have a place to live after leaving the military? Yes No
2. Do you plan to relocate after leaving the military? Yes No
3. Will you have a support system (e.g. Family, Friends, Mentor, Transportation, and Housing) in place upon relocation? Yes No
4. Have you identified current housing expenses to include furnishings, maintenance/repairs, mortgage/rent, taxes/fees, utilities, deposits, home owners insurances, renting vs. buying, etc.? Yes No
5. Will costs of living be higher than current living arrangements? Yes No
6. Assess impact of individual/family requirements on relocation options (e.g., quality of local schools, availability of medical care, spouse employment opportunities, etc.)
7. Consider using one or more cost of living calculators, such as those provided by bankrate.com, payscale.com, nerdwallet.com, and/or moving.com
8. The installation transportation office (DMO) can provide information about the movement and storage of your household goods
9. Visit the VA website to get information on the [VA home loan program](#)

Your Post-Transition Housing and Relocation Consideration Notes:

- Enter your notes regarding post-transition housing and relocation considerations.

Post-Transition Transportation Considerations

1. Will you have reliable transportation to-from your place of employment and/or school?

Yes No

2. Have you reviewed your vehicle payment, insurance, registration, and taxes? Yes No
3. Is there a need to purchase a new vehicle for you or spouse/dependents? Yes No
4. If you are disabled, determine if you are eligible for assistance in purchasing a vehicle and/or automotive adaptive equipment by visiting the [VA's website](#)

Your Post-Transition Transportation Considerations Notes:

- Enter your post-transition transportation notes.

Criterion-Based Financial Plan for Military to Civilian Transition (CRS)

1. Have you initiated a post-transition budget? Yes No
Visit the [Marine for Life Cycle](#) for a copy of the budget worksheet.
2. Are you planning for retirement/separation (e.g., TSP/401(k)/IRA)? Yes No
3. Have you evaluated your current and projected income, expenses, and debt? Yes No
4. Do you have adequate funds to support family expenses and emergencies? Yes No
5. Have you considered additional expenses (e.g., child care, commuting, etc.)? Yes No
6. Have you reviewed your free credit report at www.annualcreditreport.com/? Yes No
7. Have you reviewed your credit score? Yes No
8. Are you aware you can order your free FICO score from your installation PFM staff? Yes No
9. Have you examined your tax status with regard to taxable income? Yes No
10. Do you have an up-to-date will and/or power of attorney? Yes No
11. Do you need additional assistance to prepare for finances post-transition? Yes No

Visit an installation [Personal Financial Management Specialist](#) to assist with developing a budget based on your current financial obligations and anticipated post-transition expenses.

Your Criterion-Based Financial Plan for Military to Civilian Transition Notes:

- Enter your notes regarding your current financial obligations, anticipated post-transition expenses, and other financial considerations.

Evaluate the Benefits of the Reserve Component/Inter-service Transfer (CRS)

1. Attend the Reserve Opportunities and Obligations Brief (ROOB), to evaluate the benefits of joining the Reserve Component, if applicable. RC service may be mandatory based on your years of service
2. 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) to learn their legal rights
3. Have you considered transferring to another service? Yes No

Community Resources and Peer-to-Peer Support

1. Does the thought of leaving the military create stress on you or your family? Yes No
2. Do you have a support system (personal counsel/mentoring) in place to support your transition?
 Yes No

3. Visit [MilitaryOneSource](#) for peer-to-peer specialty consultations to discuss personal or career aspirations or challenges of military life
4. Join the [Marine For Life Network](#). The Marine for Life Network (M4L) connects transitioning Marines and their family members to education resources, employment opportunities, and other Veterans services that aid in their career and life goals outside of military service
5. Visit the [National Resource Directory \(NRD\)](#) and the [Caregiver Resource Directory](#). These websites connect wounded warriors, Service members, Veterans, their families, and caregivers to programs and services that support them

Your Community Resources and Peer-to-Peer Support Notes:

- Enter your community resources and peer-to-peer support notes.
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SECTION D: MOS / CAREER FIELDS

Career Field: Designate the career field you wish to pursue based on your personal, family, and financial obligations and desires

Desired Career Field: Enter desired career field.

Desired Relocation Destination: Enter desired relocation destination.

Identify your primary and additional MOS Titles

1. PMOS: Enter the code and title of your primary MOS.
2. ADMOS 1: Enter the code and title of your secondary MOS.
3. ADMOS 2: Enter the code and title of your tertiary MOS.

The Interest Assessment (CRS)

You will complete an interest assessment during the MOC Crosswalk course. Greater success and satisfaction occur when an individual's interests and personality type are compatible with their work environment. RIASEC scores are a measurement of your personality. [MyNextMove for Veterans](#) provides RIASEC values for occupations so you can see how your scores align with the values of different occupations.

Enter your
"R" score.

R

Enter your
"I" score.

I

Enter your
"A" score.

A

Enter your
"S" score.

S

Enter your
"E" score.

E

Enter your
"C" score.

C

Retrieve your Verification of Military Experience and Training (VMET) Document

The [VMET](#) (DD Form 2586), provides an overview of your military experience and training. You can use this document with your DD Form 214, evaluation records, training certificates, awards, transcripts, and other documentation to complete a Job Application, identify credit recommendations from the American Council of Education (ACE), and possible certification/waiver of apprenticeship requirements.

Retrieve your Joint Services Transcript (JST)

Your [JST](#) is an academically accepted document approved by ACE to validate your military occupational experience. The JST also includes military course completions, descriptions of military occupations, and college level test scores.

Update your Marine Online (MOL) email address

Have you updated your email address in MOL to ensure you stay up to date on meeting your transition milestones? Yes No

SECTION E: DETERMINE POST-TRANSITION GOALS (SELECT/COMPLETE ALL THAT APPLY) **Employment**

1. Do you already have post-military employment? Yes No
 - a. If yes, is it full-time or part-time? Full Part
2. Do you plan to get a job and start work as soon as possible? Yes No
 - a. If yes, is it full-time or part-time? Full Part
 - b. If full-time, attend the Department of Labor 2-day track and complete a Resume (CRS)
 - c. If part-time, consider attending the Department of Labor 2-day track and complete a Resume
3. Do you have an updated resume? Yes No
4. Do you plan on staying in your current career field? Yes No
 - a. Obtain your Statement of Service (temporary DD-214) from your S1
 - b. Obtain at least 3 references who can attest to your technical skills and character
 - c. Record Volunteer experience that contributes to work experience and community support
 - d. Establish a [USAJOBS](#) account and research potential federal employment opportunities if interested in federal employment
 - e. Examine the [Employment related resources](#) provided as part of the [Marine Life Cycle](#)
 - f. Attend a [LinkedIn course](#)/set up profile and join the [Marine for Life Network](#)
 - g. Seek out and use additional resources such as the local DOL [Workforce Development Office/American Job Center](#)

 Education

1. Highest Level of Education: Select highest level of education attained.
2. Do you currently possess a degree or certification? Yes No
 - a. List degree or certification

Enter your degree(s), concentration, and/or certification(s).
3. Do you currently attend a college or university? Yes No
 - a. If yes, is it full-time or part-time? Full Part
4. Do you plan to go to college? Yes No
 - a. If yes, when? Enter text.
 - b. If yes, attend the Accessing Higher Education (AHE), 2-day track to learn how to compare institutions of higher learning (CRS)
5. Schedule one-on-one counseling with an [Education Service Officer or Counselor](#)
6. Acknowledge understanding of transferability requirements (if [transferring benefits](#))
7. If applicable, [apply for GI Bill benefits](#) once you understand the criteria. Contact the academic institution GI Bill certifying official to confirm GI Bill eligibility and acceptance
 - a. VA Certifying Official name and contact information:
Enter VA Certifying Official name and contact information.
8. Examine the [Higher Education resources](#) provided as part of the [Marine Life Cycle](#)

9. Explore the following Department of Education resources: [Choosing a School](#), [College Navigator](#), [College Scorecard](#), and [Federal Student Aid](#)
10. Identify potential sources of income while attending school (e.g., employment options and [scholarship/grant](#) eligibility including academic, athletic, [need-based](#), [veteran status](#), college- or career-specific)
11. Explore the following Department of Veterans Affairs (VA) resource: [Choosing a School](#)
12. Contact the local [VA representative](#) to identify local Veteran resources

Credentialing/Apprenticeships

1. Are you currently attending a career technical institution? Yes No
2. Do you currently possess professional licenses or certifications? Yes No
 - a. List military and/or civilian license(s) or certification(s)

Enter license(s) or certification(s).
3. Have you ever participated in the COOL/USMAP/SkillBridge program? Yes No
 - a. If yes, indicate which one(s): Select a list item.
4. Do you require additional technical/apprenticeship training in your desired career field? Yes No
 - a. If yes, attend the Vocational Training 2-day track to learn how to compare technical training institutions (CRS)
5. Determine Credentialing/Apprenticeship/On-the-job training opportunities such as:
 - a. [Marine Corps Credentialing Opportunities On-Line \(COOL\)](#)
 - b. [DoD SkillBridge](#) Program
 - c. VA [On-The-Job Training and Apprenticeship](#)
6. Examine the [Career and Technical Training related resources](#) provided in the [Marine Life Cycle](#)

Entrepreneurship

1. Do you already have your own business? Yes No
2. Do you desire to start your own business? Yes No
 - a. If yes, attend the [Boots to Business](#) (B2B), 2-day track
3. Do you have a business plan? Yes No
 - a. Conduct market research on the business you plan to start
 - b. Determine legal requirements, tax implications, licenses, and hiring practices
 - c. Examine the [Entrepreneurship related resources](#) provided as part of the [Marine Life Cycle](#)

Other Post-Transition Goals

1. I do not know what I plan to do
2. Retiree
 - Other: Enter your other post-transition goal(s).

SECTION F: TRANSITION READINESS SEMINAR (TRS) ATTENDANCE AND CAREER READINESS

There are TRS attendance and CRS requirements you will be expected to meet prior to transition. Some CRSs apply to all career paths (Employment, Education, Vocational Training) while others only apply to a specific career path. TRS and CRS completion/attainment will be documented on your [DD Form 2648 eForm](#).

1. Transition Readiness Seminar Attendance Requirements

* Upon completion of Initial Counseling and Pre-Separation Counseling, check your [DD Form 2648 eForm](#) for specific TRS and CRS requirements as determined by your Transition Counselor

- Marine Corps Transition Day (**mandatory**)
- VA Benefits and Services Day (**mandatory**)
- Department of Labor – One Day Course (**mandatory unless exempt**)

Additional Tracks Offered:

- Department of Labor – 2 Day Track*
- Accessing Higher Education – 2 Day Track*
- Vocational Training – 2 Day Track*
- Entrepreneurship – 2 Day Track*

2. Career Readiness Standards Requirements

- [Register for eBenefits](#)
- Prepare a [criterion-based Financial Plan](#) for military to civilian transition
- Complete this Self-Assessment/Individual Transition Plan (ITP)
- Complete a Continuum of Military Service Opportunity Counseling (Active Component Only)
- Gap Analysis or Verification of Employment

3. Department of Labor Employment Track (if applicable)

- Completed Resume or Verification of Employment

4. Accessing Higher Education or Vocational Training Track Career Readiness Standards (if applicable)

- Complete a [comparison](#) of higher academic or technical training institution options

SECTION G: CAPSTONE REVIEW AND COMMANDER'S VERIFICATION

- Complete [Capstone Review](#) with the Transition Readiness staff no later than 120 days from EAS
- Complete [Commander's Verification](#) no later than 90 days from EAS

SECTION H: TRANSITION TIMELINE

Transitioning Service members are encouraged to develop a [Transition Timeline](#) as part of the [Marine for Life Cycle](#) to follow your individual timeline. The deadlines in [Section B: Transition Dates](#) in this document are just a few of the dates you should include in your transition timeline. [Highly qualified professionals](#) are available to assist you in developing this timeline. This sample timeline does not include all of the possible considerations you need to make, as transition requirements vary by individual.

What actionable steps do I need to take to position myself and/or my family for success?

- Enter your action steps.

Who do I need to make an appointment with based on my individual/family needs?

- Enter the persons/resources you with whom need to schedule appointments.

Your additional notes/items for consideration:

- Enter your additional notes.