

<b>AGENCY PRE-APPOINTMENT REQUEST CHECKLIST NON-POLITICAL EXCEPTED SERVICE POSITIONS</b>		
<i>Please submit the following information along with a dated cover letter signed by the agency HR Director certifying that the proposed action meets all merit and fitness requirements in 5 U.S.C. 2301 and 2302 and Civil Service Rules 4.2 and 7.1.</i>		
Requesting Agency		
Agency Point of Contact (Name, telephone number, email address for follow-up questions)		
Name of Proposed Selectee		
Current Political Appointee	Former Political Appointee	
Proposed Civil Service Position (Title, Pay Plan, Series, Grade, and Appointing Authority)		
Location of Proposed Position (Component/Office)		
Proposed Rate of Basic Pay	Proposed Rate of Adjusted Pay (Including Locality)	
Political Position (Title, Pay Plan, Series, Grade, and Appointing Authority)		
Agency/Component/Office Political Position Held		
Rate of Basic Pay as Political Appointee	Rate of Adjusted Pay as Political Appointee	Former Political-Appointment Date of Political Position
Current Political - Date of Political Appointment in Agency Currently Employed		Former Political - Ending Date of Political Position

- The position descriptions for the candidate's current or former political appointment and for the proposed appointment. Please include a fully executed OF-8 or equivalent showing why and how the respective positions were established. Explain any relationship between the two positions.
- A copy of the political appointment and resignation/termination SF-50, if available.
- An organizational chart identifying where both the political and the proposed positions reside within the agency or respective agencies.
- A statement explaining the disposition of the proposed selectee's current political position, if vacated.
- A statement disclosing any personal or professional relationship between the requesting agency's recommending and selecting officials (or anyone in the reporting chain) and the proposed selectee.
- The complete case file for the proposed merit selection, including:
  - Evidence of fair and open competition (a recruiting notice, if one was used)
  - Description of recruiting sources and advertising methods
  - Qualification standard used
  - Copy of agency policy for accepting excepted service applications
  - Applications from all who applied and information showing how each met or failed to meet established qualifications
  - Information showing how veterans' preference was considered
  - The referral list(s) issued to the selecting official and the completed referral list documenting the tentative selection
- The names of rating/ranking panel members (if applicable) and their titles, telephone numbers, email addresses, and types of appointment (e.g., career SES, Schedule C, or Presidential Appointee).
- The names of the recommending and selecting officials, title, telephone number, email address, and type of appointment (e.g., career SES, Schedule C, or Presidential Appointee).
- Documentation on the interview process, including interview questions and notes, the names of interviewers/panel members (contact information, type of appointment), and candidates interviewed.

*Please note this Checklist does not apply to:*

- Appointment of an individual from one Schedule C position to a different Schedule C position or
- Movement of an individual from one Presidential appointment to a different Presidential appointment.

*If OPM determines the selection appears to be free from political influence and in compliance with merit system principles, applicable civil service laws, and regulations, provide the following to [PoliticalConversions@opm.gov](mailto:PoliticalConversions@opm.gov):*

- If appointed to the proposed position, please provide OPM a copy of the appointment SF-50, within 60 days of appointment, or as soon as practicable.
- If not appointed to the proposed position, please notify OPM, within 60 days of the decision, or as soon as practicable.