

An Employee Clearance form is required for every separating employee, including employees transferring from one department to another and employees going on an extended leave of absence with out pay ensuring the return of all state owned items such as credit cards, keys, state records, and equipment; that access to state systems has been canceled and that all travel and salary advances have been re-paid.

Instructions: See attached instructions for assistance in completing this form.

Employee Data

| | |
|--|-------------------------------|
| Employee Name: _____ | Employee ID: _____ |
| Department/College: _____ | Last day of employment: _____ |
| Employee Status: <input type="checkbox"/> Faculty <input type="checkbox"/> Staff <input type="checkbox"/> *FERP <input type="checkbox"/> Graduate Assistant or Teaching Associate | |
| Type of Separation: <input type="checkbox"/> Separating this department only <input type="checkbox"/> Resignation <input type="checkbox"/> Retirement <input type="checkbox"/> Other | |
| * Please refer to the Separation/Clearance Guideline Sheet | |

University Clearance: Employees must visit university offices to obtain appropriate signatures before the exit conference.

| | | | |
|---|---|-------------------|-------------|
| University Library MLK Library 808-2326 | <input type="checkbox"/> Library fines <input type="checkbox"/> University materials | Print Name: _____ | |
| | | Signature: _____ | Date: _____ |
| Lock Shop 10 th and San Fernando 924-7100 | <input type="checkbox"/> Keys <input type="checkbox"/> Building Access card | Print Name: _____ | |
| | | Signature: _____ | Date: _____ |
| University Police 7 th Street, UPD Building 924-6557 | <input type="checkbox"/> Citations <input type="checkbox"/> Cancel payroll deduction <input type="checkbox"/> Parking permit | Print Name: _____ | |
| | | Signature: _____ | Date: _____ |
| Procurement & Support Services Clark Hall 5 th Fl, 500 924-1660 | <input type="checkbox"/> Procurement/Credit Cards <input type="checkbox"/> Travel Advances <input type="checkbox"/> Moving Expenses <input type="checkbox"/> PeopleSoft Security | Print Name: _____ | |
| | | Signature: _____ | Date: _____ |

Department Clearance: Departments are responsible for costs associated with the failure to secure university property and resources upon separation of an employee.

| | |
|---|---|
| <input type="checkbox"/> Final time and attendance approved in Absence Management | <input type="checkbox"/> Department property returned: (computers, cell phones, etc.) |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Does employee have direct reports (absence management)? If yes, submit completed position management action form to Human Resources. | |
| <input type="checkbox"/> Voicemail cleared | <input type="checkbox"/> Cash Net clearance through Bursar's Office 924-1601 |
| Print name: _____ | Title: _____ |
| Signature: _____ Date: _____ | |

Human Resources

| | | | |
|---|--|--|------------------------------------|
| <input type="checkbox"/> Exit Survey | <input type="checkbox"/> COBRA | <input type="checkbox"/> Conflict of Interest <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| <input type="checkbox"/> Confidentiality Reminder | <input type="checkbox"/> W2 address verification | <input type="checkbox"/> Retirement Contribution Forms | <input type="checkbox"/> Final Pay |
| Signature: _____ | | | Date: _____ |

Upon separation, I understand that I have an ongoing responsibility to maintain the confidentiality of any student and/or employee information to which I may have had access to during my employment at the university.

Employee Signature: _____ Date: _____

These instructions are to assist in completing the Employee Clearance form when an employee separates from his/her active employment status from San Jose State University. This process is also required for employees going on an extended leave of absence. The employee clearance is to ensure all university property and resources are recovered prior to an employee's last day physically worked.

Employee Status

Please check appropriate box. * Faculty Early Retirement Program (FERP), faculty who participate in FERP normally go through clearance in their last year of participation.

Separating this department only

Check this box if the employee is separating from the designated department only e.g., an employee is separating from one department and is transferring to another department on campus.) * Employees are not required to clear from the Library, and UPD.

Time and Attendance

Ensure all time and attendance is entered in Absence Management for manager approval prior to transferring or separating from Department or University.

Department property

Ensure the return of wireless devices, laptop computers or any other equipment issued by the department to a supervisor/department coordinator.

Voicemail cleared

Ensure all messages and greetings have been removed from separating employee's phone.

University Library

Verify with the library that all books and university materials have been returned and overdue fines are paid.

Lockshop

Ensure that every key checked out has been returned. The employee will be required to pay the cashier for any lost keys.

UPD

Employee must return his/her parking permit. If the employee has a monthly payroll deduction for the parking permit, the deduction must be canceled with Traffic and Parking Operations.

CashNet

Department must contact Bursar's Office to ensure employee's CashNet Operator Access for EMarket, Reporting or Cashiering is canceled.

Procurement & Support Services

If the employee has been issued a credit card and/or procurement card, return the cards to Procurement & Support Services.

Conflict of Interest

The Political Reform Act requires that employees who are designated in an agency's conflict of interest code must file a Statement of Economic Interests Form, which will be provided by Human Resources at the exit conference.

I. PURPOSE / DESCRIPTION

An Employee Clearance Form is required for every separating employee to ensure the return of all state-owned items such as credit cards, keys, state records, and equipment; access to state systems has been canceled and that all travel and salary advances have been paid (cleared) prior to the issuance of final separation pay. Departments may be responsible for costs associated with the failure to secure university property and resources upon separation of an employee.

Faculty and staff who are separating from employment, retiring and/or returning as a retired annuitant must complete the separation /clearance process by the last day of employment. Faculty and staff who are transferring from one department to another or going on an extended leave of absence without pay shall complete the separation/clearance process by the last day of work in their department.

Faculty members participating in the Faculty Early Retirement Program (FERP) Lecturers, Teaching Associates (TA's) and Graduate Assistants (GA's) whose appointments are continued from semester to semester do not normally go through clearance procedures until final separation from the University.

Employees providing at least 72 hours advance notice of their intent to resign or retire will receive their final separation payment on their last day of employment. Employees who resign or retire with no advance notice will be provided their final separation payment no later than 72 hours after their last day of employment.

II. PROCESS

A. EMPLOYEE RESPONSIBILITY

1. The employee will provide written notification of his/her intent to resign or retire from the University to their immediate supervisor. Two weeks' notice of resignation is considered appropriate whenever possible. The notice is helpful because it allows the department to work with payroll in order to have a timely final separation payment.
2. Enter time and attendance in Absence Management for manager approval. Important: Employees final separation payment will not be calculated until absences are entered and approved in Absence Management.
3. Complete the Employee Clearance Form by the last day of employment with the University.
4. Schedule an exit conference with your personnel services representative. A completed employee clearance form is required at the time of the exit conference.

B. DEPARTMENT RESPONSIBILITY

The appropriate administrator will:

1. Contact their personnel services representative as soon as an employee has provided notice of his/her intent to resign. For all faculty, please contact the Office of Faculty Affairs at 924-2450.
2. Provide the employee with a copy of this policy Separation/Clearance Process and initiate the Employee Clearance Form ensuring all department obligations are met before the employee's exit conference.
3. Submit a completed Employee Profile, and resignation letter to your personnel services representative as soon as the employee has provided notice of his/her intent to resign. Faculty resignation letter and employee profile must be routed through the Dean's office to the Office of Faculty Affairs.
4. Enter and approve the separating employee's time and attendance in Absence Management.
5. If separating employee has any direct reports for absence management purposes, submit a completed position management action form to designate a "new reports to" and send the form directly to Workforce Planning in Human Resources.

C. HUMAN RESOURCES RESPONSIBILITY

At the time of your scheduled exit conference your personnel services representative will finalize the clearance process by collecting your completed clearance form and provide the following information:

1. Retirement information and forms
2. W2 address verification
3. Final separation payment
4. Instructions for online exit survey
5. Employee obligation to maintain confidentiality
6. Conflict of Interest (if applicable)

III. ATTACHMENTS

Employee Clearance Form