EMPLOYEE CLEARANCE PROCEDURES

I. PURPOSE / DESCRIPTION

An Employee Clearance Procedure is required to ensure the return of all state property and government issued items such as Procard, keys, state records, and equipment; to ensure access to state systems has been cancelled; and that all travel, stipends and salary advances have been accounted for. Under provisions in the State Administration Manual, Section 8580.4, the Clearance Procedure must be completed for separating employees prior to their last day on campus or last day of employment, whichever is first. Signatures or clearance approvals are required from a designated individual for each area of responsibility in the Clearance Procedure indicating completion. In addition, employees are reminded of their ongoing legal responsibility for maintaining the security and confidentiality of protected data (both electronic and hard copy) they had access to while at the University.

The Employee Clearance Procedure must be completed for all employees who are separating from employment, retiring, going on an extended leave, or transferring to another department and must be verified complete by their supervisor/department prior to the last day of employment or last day worked whichever is first. The immediate supervisor is responsible for ensuring this process is completed.

II. RESPONSIBILITIES

a. EMPLOYEE RESPONSIBILITY

NOTE: **For a temporary appointment that ended as scheduled, follow steps 2-4 and 7 only.**

1. Provide written notification of intent to resign or retire from the University to immediate supervisor by completing the Separation Form. A minimum of two weeks notice is considered appropriate whenever possible. The Separation Form can be found on the Human Resources (HR) and Faculty Affairs (FA) websites and accessed via the link below as well. Separation Form
2. Complete Absence Management self-service prior to last day worked.
3. Return all keys to Facilities Services, if applicable.
4. Return parking permit to University Police, for a temporary permit issued through the last day worked, if applicable.
5. Confirm the completion of the Employee Clearance Procedure by all areas with Supervisor.
6. Schedule appointment with FA or HR for final clearance and separation information, if desired.
7. On a voluntary basis, complete the Exit Interview Survey.

Employees transferring from one department to another, or going on an extended leave of absence, shall complete the Employee Clearance Procedure by the last day worked in their department.

b. SUPERVISOR/DEPARTMENT RESPONSIBILITY

NOTE: **For a temporary appointment that ended as scheduled, follow step 4-5 only.**

The appropriate supervisor will:

1. Contact FA or HR as soon as an employee has provided notice of his/her intent to resign or retire.
2. Request written notice from employee of his/her intent to resign or retire, directing the employee to the online Separation Form referenced in the Employee Responsibility section, 1.
3. Notify the employee of acceptance of resignation or retirement, sign the Separation Form and forward the hardcopy of original form, completed and signed, to the FA or HR offices at MSR340 and MSR320 respectively, scanning and sending via email to FA at facultyaffairs@csustan.edu or HR at hr_assistant@csustan.edu with the subject line of 'Separation from Employment', or faxing it to FA at 209-664-6536 or HR at 209-664-7182.
4. Initiate the Employee Clearance Procedure (link below) and inform the employee that an email will be sent to the employee with the details of the employee's responsibility. When the Employee Clearance Procedure is completed, the supervisor will receive an email and shall notify the employee that all clearance tasks have been completed. Clearance Form
5. For temporary faculty appointments with an expected end date, which are being renewed for the subsequent term, Request to Appoint forms indicating the renewed assignment details must be submitted to Faculty Affairs to complete the Clearance Waiver in lieu of the Separation/Clearance Process.

Employees transferring from one department to another, or going on an extended leave of absence, shall complete the Employee Clearance Procedure by the last day worked in the department.

c. FACULTY AFFAIRS/HUMAN RESOURCES RESPONSIBILITY

Faculty Affairs or Human Resources will be available to meet with employee upon request to answer any questions and or provide/verify information such as:

- Retirement information and forms
- W2 address verification
- Expected date of final pay
- Benefits end date if applicable
- Extended leave/department transfers
- Provide opportunity for an in-person or electronic version of the exit interview.
- Upon receipt of the Request to Appoint form, Faculty Affairs shall complete the Clearance Waiver

Temporary faculty with active concurrent appointments or in the middle of a 3-year appointment may not have to proceed with the Separation/Clearance process and a Clearance Waiver will be processed by Faculty Affairs on their behalf.

III. ELECTRONIC WORKFLOW

a. ELECTRONIC PROCESSING STEPS

- Department/Supervisor tasks (verification, personal office/space cleared, desk keys, etc.)
- Payroll tasks (final paycheck, envelope for final paycheck/advice)

- Financial services tasks (ProCard, financial systems access, stipends, advances)
- Facilities tasks (keys)
- Public Safety tasks (parking permit, refund process if applicable)
- Cashiers tasks (cash drawer fund, petty cash fund, vault access)
- OIT (media and computer equipment returned/accounted for, systems access)
- Benefits (fee waiver cleared/verified, retirement information)
- Human Resources (conflict of interest)
- Faculty Affairs (Clearance Waiver in lieu of Separation/Clearance process)