



## Faculty/Staff Separation & Clearance Process Guidelines

All faculty and staff who are separating from SDSU employment must be cleared through the separation and clearance process. Temporary faculty members who are expected to return during the following semester may be exempt from this process at the discretion of the dean of the college. If an employee is retiring and returning as a rehired annuitant, the department still needs to complete the separation and clearance process.

### Department Responsibility

Each department should have at least two individuals (manager, supervisor, department chair, department coordinator) who are responsible for clearing all faculty and staff during this process. **If an employee is not available to complete the separation and clearance process**, the person completing the process should make sure that all information is accurately completed.

### Guidelines on Completing the Process

*Please complete all of the fields, whether or not they apply to the employee. Once complete, an electronic notification will be sent to several campus offices (HR, Public Safety, TNS, Cashier's Office, and Environmental Health & Safety).*

**Employee Name:** Please use the employee's full name. To avoid confusion, please do not use nicknames or shortened names.

**Department:** Select the appropriate department from the drop-down menu. The department ID (first segment of the Oracle account string) is listed for your reference.

**Manager/Supervisor Name:** Name of the employee's manager/supervisor (no nicknames or shortened names).

**Manager/Supervisor Phone Number:** Campus phone number of employee's manager/supervisor.

**Last Day of Employment:** This should be the official last day on payroll status as an SDSU employee, whether or not the employee is physically on campus. The employee may use vacation, personal holiday, furlough and/or CTO and remain in pay status prior to separation.

**Last Day Physically at Work:** This is the actual last day the employee physically worked, which may or may not be the last day of employment.

**CalPERS Retirement Date:** This is the first day an employee is retired and therefore no longer active with SDSU. It is usually the day following the last day of employment; for example, if the last day of employment is May 28<sup>th</sup>, the CalPERS retirement date is May 29<sup>th</sup>.

**Reason for Leaving:** Select the appropriate reason the employee is leaving. If retiring, please indicate if he/she plans to return to SDSU employment as a retiree or if he/she is leaving the university completely. If your selection fits into the "Other" category, be sure to explain in the Comments section.

**Pursuant to the CSU Directive HR 2002-31, the department is required to notify separating employees of the requirements below:**

*Instructional Technology Services*

- Employee must return any SDSU equipment checked out from ITS.

*University Computer Operations*

- If employee has been issued a site license for software, the software should be removed from the computer and UCO notified at (619) 594-3712.

*Library Services*

- Employee must return all outstanding books and materials. Retirees are entitled to continue their library privileges as long as they change their status with the library (after receiving a retiree ID card from HR).

*Public Safety*

- Employee needs to return all keys and/or access cards to Key Issue.
- Any parking permits must be returned to Parking Services (either at the Public Safety window or the parking kiosk on College Avenue and Canyon Crest Drive).

*Human Resources*

- Requests for an exit interview may be scheduled by calling (619) 594-8323.
- Employees will be provided information regarding the continuation of health benefits, as well as retirement contribution options (if not retiring). If they have questions regarding either, please have them call Benefits at (619) 594-1144.
- A final attendance summary must be submitted to Payroll Services, either by mail at MC 1625, by fax at (619) 594-0881, or in person, Extended Studies Center, Room 406.
- If employee is changing his/her address, please have him/her update their address with HR prior to the separation. He/she may either call (619) 594-5251 or complete the *Employee Action Request* form found at: <http://hr.sdsu.edu/pdf/Payroll/EAR.pdf>
- If employee was a Form 700 filer, request that employee complete Form 700, marking the "Leaving Office" statement in Section 3, and submit it to HR within 30 days of separation. Form 700 may be downloaded at: <http://www.fppc.ca.gov/forms/700-10-11/Form700-10-11.pdf>

*Department*

- Confirm that the following items have been returned:
  - SDSU phone authorization card, voice password (return to TNS, Education & Business Administration 129, (619) 594-4154).
  - American Express Card (return to Enterprise Operations, Administration 320, (619) 594-6018).
  - Wireless devices, laptops, home computers (return to department).
- If employee has been issued a procurement credit card or has outstanding travel advances, please contact Accounts Payable at (619) 594-0894.
- If employee was enrolled in a medical surveillance (monitoring) program, ensure that he/she schedules an exit interview with Environmental Health & Safety by calling (619) 594-6778.
- Ensure that faculty members submit their grades by the designated deadline.
- Unless retiring, SDSU ID cards should be turned in to a supervisor/manager.
- Remind employee of his/her obligation to maintain confidentiality of SDSU data.