

Faculty and Staff Separation/Clearance Process

WHO NEEDS TO COMPLETE THE SEPARATION/CLEARANCE PROCESS?

All faculty and staff who are separating employment from CSUN must complete the separation/clearance process. Full and Part-time 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/clearance process.

DEPARTMENT/OFFICE RESPONSIBILITY:

Each department should have at least one designee (and one back-up designee) who is responsible for clearing all faculty and staff during this process. The [Separation/Clearance Designee Election Form signature\(s\)](#) must be on file in the Office of Human Resources to be valid.

If the employee is not available to complete the Separation/Clearance Form, the Department Designee should make sure that all of the information is complete on the form, including Part 1, Section C, and Part 2, Section D. Information may be gathered via a phone call or other means. The Department Designee should check the appropriate box at the top of Part 1, Section C, and Part 2, Section D.

1) **Part 1** – Part 1 of the form should be completed immediately upon notification of a pending employee separation and sent with appropriate attachments to the Office of Human Resources, University Hall, Room 165 /Mail Code 8229.

a) **Section A – Employee Data**

- **End of Temporary Appointment or Resignation**: Check the appropriate box signifying whether the Employee's Temporary Appointment is ending or the Employee is resigning. **Employees who are resigning from the University must submit a letter of resignation to their supervisor, which states the date of the resignation. Note that employees may complete the resignation statement on Part 1, Section C of the Faculty and Staff Separation/Clearance Form (this form) in place of a letter of resignation. Supervisors should accept the resignation in writing and forward a copy of their acceptance with Part 1 of this form to their Department Designee. Note that resignations are effective at the close of business on the day of the resignation. The Department Designee will forward the appropriate documents to the Office of Human Resources.**
- **CSUN ID #**: This is the PeopleSoft HR system-assigned employee ID number that is a unique identifier for those employees on the HR database.
- **First Day of Separation Status**: List the first day (beginning of business) that the employee will be separated from the University.
- **First Day of Retirement Status**: List the first day (beginning of business) that the employee will be retired from the University.
- **Last Day Physically Worked**: List the last day (close of business) that the employee actually worked.
- **Job Code**: May be left blank if "Job Title" is complete.

b) **Section B – Department Certification and Approvals**

- This form will not be processed without the Department Administrator's (or appropriate Department Designee's) signature. After approvals are secured, the form should be forwarded (or sent with the separating employee) to the Office of Human Resources, University Hall, Room 165/ Mail Code 8229.
- **The separating employee's absences should be entered into the Absence Management system when submitting Part I. Note: the employee's final pay warrant will not be calculated until all hours have been inputted.** Please note, if the employee is hourly you will also need to attach the [Campus Timesheet](#) and [Authorization for Extra Hours Worked](#) (if applicable).
- A letter of resignation should be procured from all faculty or staff who are resigning or retiring. (Not applicable for separations of temporary employees with appointment expiration dates.) Copies of the document should be forwarded with the attached Faculty and Staff Separation/Clearance Form Part 1, to the Office of Human Resources, University Hall, Room 165/Mail Code 8229. Employees may complete the resignation statement on Part 1, Section C of this form in lieu of a letter of resignation.

- If an employee's signature cannot be obtained on the form, the department is required to notify the employee of his/her continued responsibility for maintaining the confidentiality of university information.

c) Section C – Employee Responsibility

- Mailing Address: If left blank, all information and pay warrants will be sent to the address currently in the Human Resources database.
- Employee Signature: Employee acknowledges that they agree with the statement in Section C and that the effective date of the resignation is correct.

2) Part 2 – Part 2 of the form should be completed prior to employee's last day. After approvals are secured, forward (or send with employee) to the Office of Human Resources, University Hall, Room 165/Mail Code 8229.

a) Section A – Employee Data (see above for explanation of fields)

b) Section B – Employee Clearance

- The Department Designee is responsible for clearing each employee of all outstanding campus obligations.
- Make phone calls or send an email to appropriate departments to make sure the employee has no outstanding obligations. If the employee is cleared, initial the "Cleared" box. If the employee has outstanding obligations, send employee to that department for clearance. The Department Designee should reconfirm the clearance in question before signing off on the document.
- Email the Fee Waiver Coordinator at feewaiver@csun.edu listing the employee's name, EMPLID, and date of termination. This email will serve as your clearance obligation. The Fee Waiver Coordinator will be responsible for removing the waiver, if applicable.
- Each Department should prepare its own checklist of required clearances as they pertain to the department. List all additional departmental clearances on the Separation/Clearance form as a record of all items returned and areas cleared. Some clearances may require a more immediate (phone) notification of a pending resignation to ensure the integrity of the system/process.
- Destroy all Employee ID cards after they are collected and notify the Lock Shop of an employee's separation, pursuant to PPM's Key Control policy.
- After notifying the Purchasing Department (Ext. 2301) of the separation of an employee who was issued a Procurement Card, it must then be hand carried to the Alternate Program Coordinator in the Purchasing Department. (Do not put the Procurement Card in campus mail!)

c) Section C – Department Certification and Approvals

- The Department Designee should certify that the employee has cleared all outstanding obligations and has completed Section D on the form.
- This form will not be processed without the Department Administrator (or appropriate Department Designee's) signature. Any exceptions to the clearance process need to be approved by the Department Administrator and the Associate Vice President of Human Resources.
- After approvals are secured, the form should be forwarded (or sent with the separating employee) to the Office of Human Resources, University Hall, Room 165/ Mail Code 8229.

d) Section D – Employee Responsibility

- Keys/Key Cards: Departments are responsible for notifying PPM and returning keys and key cards to PPM pursuant to PPM's Key Control Policy. Note: Employees who have lost keys or key cards must be cleared through PPM by taking this form to the PPM Lock Shop when completing the Separation/Clearance process. PPM will then authorize clearance on this form.
- Parking Decal: If the employee has their parking fees paid through a payroll deduction, they must return the parking decal to Parking and Transportation Services in order to stop the payroll deduction. Parking Services will then authorize clearance on this form. Please note changes to payroll deduction can take up to 30 calendar days to be processed with the State Controller's Office.
- Employee Signature: Employee acknowledges that they returned all CSUN property and paid all debts, if applicable, owed to CSUN. Employee acknowledges their resignation from CSUN.

e) Section E – HR Benefit Forms and Separation Checklist (HR/Benefits Administration use only)

- Benefits Coordinator will issue COBRA forms, allowing employees enrolled in health, dental, and/or vision plans the opportunity to continue their coverage.
- The employee will also receive the appropriate forms to withdraw or transfer his/her money from the retirement plan.

**CALIFORNIA STATE UNIVERSITY, NORTHRIDGE
Faculty and Staff Separation/Clearance Form - PART 1**

A	COMPLETED BY DEPARTMENT OFFICE			<input type="checkbox"/> End of Temporary Appointment
The Department Designee is responsible for ensuring that the Separation/Clearance process is properly completed for each separating employee. After completion, this form must be returned to the Office of Human Resources, HRIS with authorized signatures.				<input type="checkbox"/> Resignation (includes Retirement) (Resignation Required - See Section C)
CSUN ID #:		Employee Name:		
First Day of Separation Status:		First Day of Retirement Status: (If Applicable):		Last Day Physically Worked:
Dept ID:	Department Name:	Job Code:	Job Title:	
Employee Status: <input type="checkbox"/> Staff <input type="checkbox"/> Faculty		<input type="checkbox"/> Permanent / Tenured <input type="checkbox"/> Temporary	<input type="checkbox"/> Probationary / Tenure Track <input type="checkbox"/> Other:	
B DEPARTMENT CERTIFICATION AND APPROVAL – Department Designee signature must be on file in the Office of Human Resources to be valid.				
Department AVP, Director, Chair, or Designee Signature:		Print Name:	Ext:	Date:
C TO BE COMPLETED BY EMPLOYEE Employee Unavailable to complete this form.				
MAILING ADDRESS --- This will change your Employment Record in HR and Payroll. Your Wage and Tax Statement (Form W-2) and any final warrants will be mailed to the address below:				
(Number, Street, Apt. No)		(City)	(State)	(Zip Code)
PARKING DECAL – You are responsible for returning your parking decal to Parking and Transportation Services on your last day. If you are eligible for a refund it will be handled at that time.				
I hereby tender my resignation from California State University, Northridge. This resignation is executed by me freely and of my own free will, and is not given by reason of any threat, force, duress, or any undue influence by any person or persons. I understand that upon separation from California State University, Northridge, I have an ongoing responsibility for maintaining the confidentiality of university information. My resignation is effective close of business on _____.				Date:
Employee Signature:				

Please send Part 1 to the Office of Human Resources as soon as the employee has resigned or the appointment will not be renewed and attach the employee's letter of resignation and acceptance for resignations.

Part 2 must be completed and sent to the Office of Human Resources prior to employee receiving final pay.

CALIFORNIA STATE UNIVERSITY, NORTHRIDGE
Faculty and Staff Separation/Clearance Form - PART 2

A COMPLETED BY DEPARTMENT OFFICE – The Department Designee is responsible for ensuring that the Separation/Clearance process is properly completed for each separating employee. After completion, return this form to Human Resources, Benefits Administration with authorized signatures.				
CSUN ID #:		Employee Name:		
First Day of Separation Status:	First Day of Retirement Status: (If Applicable):	Last Day Physically Worked:	Dept ID:	Job Code:

B EMPLOYEE CLEARANCE – Department Designee is responsible for clearing employee of all outstanding obligations within department and on campus. All clearances indicated by a * must be cleared through the department extension listed or by e-mail when indicated. Departments may have additional clearances, which may be required for record keeping. Additional required clearances should be listed below.				
Campus Required Clearances:	Cleared:	Dept. Issued Required Clearances:	Cleared:	
Employee ID Card (Destroyed)		<input type="checkbox"/> Grades (Faculty Only)		
University Keys / Key Cards / Locks Returned (See Section D below if keys/key cards were lost.)	<input type="checkbox"/> Returned <input type="checkbox"/> Lost	<input type="checkbox"/> University Equipment Returned: (Computers, Cell Phones, Pagers, etc.)		
*University Library (Ext. 2274)		<input type="checkbox"/> Procurement Card/Cancel access to Staples (See Instructions) (Ext. 2301)		
US Bank Travel Credit Card (Ext. 3115)		<input type="checkbox"/> Security/Alarms		
*Payroll – A/R's, Advances, etc. (Ext. 2314)		<input type="checkbox"/> Cancel Key Codes		
*University Cash Services (Ext. 6990)		<input type="checkbox"/> Change combination of Safe and Vaults (if employee knows combination)		
Payroll Deduction for Parking? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes , then see Section D below.	<input type="checkbox"/> Cancellation of Signature Authority		
Fee Waiver (feewaiver@csun.edu)				
PeopleSoft Access File Appropriate Forms				
Finance – SOLAR Financials				
<input type="checkbox"/> Other:		<input type="checkbox"/> Other:		
<input type="checkbox"/> Other:		<input type="checkbox"/> Other:		

C DEPARTMENT CERTIFICATION AND APPROVAL – Department Designee signature must be on file in Human Resources to be valid.			
Department AVP, Director, Chair, or Designee Signature:	Print Name:	Ext:	Date:

D TO BE COMPLETED BY EMPLOYEE – If the employee has a Payroll Deduction for Parking, and/or has lost an assigned key or key card, an authorization must be secured in the appropriate department.		Employee Unavailable to complete this form.
Keys/Key Cards: If keys or key cards issued to the employee are lost, Employee must take this form to the PPM Lock Shop for clearance.	Authorization by Physical Plant Management:	Date:
Parking Permit – Returned Permit? <input type="checkbox"/> Yes <input type="checkbox"/> No	Authorization by Parking Services:	Date:
I certify that I have returned all University property and paid all debts as listed above.		Date:
Employee Signature:		

E THIS SECTION TO BE COMPLETED BY THE OFFICE OF HUMAN RESOURCES	
Forms Issued: <input type="checkbox"/> COBRA Form and Information <input type="checkbox"/> CalPERS Retirement Form (STD 687) <input type="checkbox"/> UC/DC Retirement Form <input type="checkbox"/> PST/DPA Retirement Form	Separation Checklist: <input type="checkbox"/> Completed Report of Separation/Resignation (OPER 30-24) <input type="checkbox"/> Clearance Form is complete and has necessary signatures. <input type="checkbox"/> Separation forms processed to HRIS/Employment.
Human Resources Authorization: I verify that clearance is complete and has the proper authorization.	Date: