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**SUBJECT: SEPARATION FROM EMPLOYMENT - RESIGNATION & RETIREMENT**  
**DATE: June 2022**

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## **I. PURPOSE / DESCRIPTION**

Faculty and staff who are separating employment from SJSU must complete the separation/clearance process by the last day of employment with the University. An *Employee Clearance Form* is required for every separating employee to ensure that all obligations are met, including the return of University property and final payment of wages.

Faculty members participating in the Faculty Early Retirement Program (FERP) and Lecturers whose appointments are continued from semester to semester do not normally go through the clearance procedures until final separation from the University.

## **II. PROCESS**

### **A. Department Responsibility**

The Appropriate Administrator will:

1. As soon as notice has been provided of the employee's intent to resign or retire, contact the appropriate UP team:
  - Staff/MPP/Student Assistants: Contact your Employee Support Services Representative
  - Faculty or ASE position: Contact [up-facultyservices@sjsu.edu](mailto:up-facultyservices@sjsu.edu)
2. Obtain a copy of the separating employee's resignation letter.
3. Generate the Employee Profile for staff/tenure-line faculty or the Revision Appointment Form for temporary faculty in PeopleSoft and complete the following:
  - a. Effective Date field: Indicate the separating employee's resignation date.
  - b. Action/Reason field: Indicate TER/RSN.
  - c. Comments field: Indicate the last day that the employee physically worked, which may be different from their resignation date.
    - For tenure-line faculty only, in the Comments section of the Employee Profile, indicate one of the following reasons for resignation:
      1. Desire to relocate
      2. Dissatisfied with job
      3. Family and/or child care
      4. Health
      5. Self employment
      6. Spouse's job
      7. To accept other job
      8. To attend school
      9. To look for another job
      10. Unknown: please explain
  - d. Sign the Employee Profile/Revision Appointment Form at the bottom.

4. Submit the signed paperwork and copy of the resignation letter to UP, as follows:
  - Staff/MPP/Student Assistants: Submit the signed Employee Profile and copy of the resignation letter to your [employee-support-services@sjsu.edu](mailto:employee-support-services@sjsu.edu)
  - ASEs/Temporary Faculty: Submit the signed Revision Appointment Form with zero FTE (after updating CSU Contract Data) and copy of the resignation letter to the OnBase upload form
  - Tenure Track Faculty: Submit the signed Employee Profile and copy of the resignation letter to [up-facultyservices@sjsu.edu](mailto:up-facultyservices@sjsu.edu)
5. Provide the employee with a copy of these *Separation from Employment-Resignation & Retirement*.
6. Enter and approve the separating employee's absences in Absence Management.
7. If the separating employee has any direct reports for Absence Management purposes, submit a completed [Position Management Action Form](#) to designate a "new reports to."
8. Initiate the [Employee Clearance Form via DocuSign](#) and ensure that all department obligations are met before the employee's exit interview. This must be completed before the employee's last day.

## B. Employee Responsibility

The employee will:

1. Provide as much advance notice as possible of intent to separate from employment with the University.
2. Provide written notification of intent to resign or retire to the manager/supervisor/department chair.
3. Enter all absences in Absence Management for manager's approval.
4. Electronically sign the [Employee Clearance Form via DocuSign](#) by the last day of employment with the University.
  - a. Coordinate with your appropriate manager/supervisor to confirm that all University property within the department has been returned.
  - b. Communicate with pertinent University departments as listed on the *Employee Clearance Form* to arrange for the return of University property, including keys and library materials.
5. Schedule an exit interview with the appropriate Employee Support Services Representative in University Personnel. The exit interview will include the items listed below in C.3.
6. Ensure that all obligations are met on or before the final day of employment.

## C. University Personnel Responsibility

Upon notification of resignation or retirement, University Personnel will:

1. Process the Employee Profile and final payment once all absences have been entered and approved in Absence Management.
2. Contact the employee and manager to provide information regarding proper clearance procedures and to schedule an exit interview with the separating employee.

3. Conduct an exit interview that includes the following:
  - a. Provide retirement plan information and forms.
  - b. Provide information regarding payment of final wages.
  - c. Review the *Employee Clearance Form*.
  - d. Encourage completion of the exit survey, which provides an opportunity for the employee to communicate views about the job, the department, and the University.
  - e. Confirm the employee's current and forwarding mailing address.

**III. Attachments**

*Employee Clearance Form*