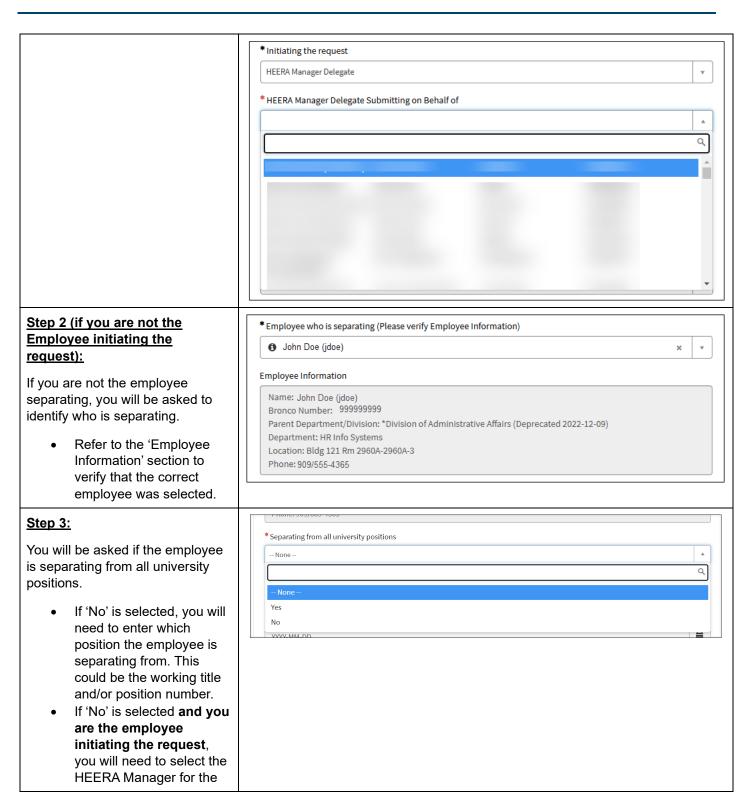


Access to this user guide is available on the $\underline{\mathsf{EODA/HR}}$ Operations Offboarding Webpage.

| Processing Step | Screen Shot |
|--|---|
| Step 1: Select who is initiating the separation (choose one): | Separation & Clearance Form Initiate a CPP state-side resignation or retirement. |
| Employee – You are the employee separating. HEERA Manager – You are the separating employee's HEERA Manager. HEERA Manager Delegate – You are the delegate of the separating employee's HEERA Manager. EODA/HR Operations or ELR&C – You are an HR employee separating an | This form is to be filled out by the employee who is separating, along with their manager or manager delegate to initiate the notice of separation and property clearance. If resigning from a temporary appointment prior to the original end date, please complete this form. Employees with multiple positions should specify the particular role they are resigning from to prevent the termination of their entire employment. This form is not applicable for student assistant appointments. Prior to the employee's last day, the following must be completed: Entry and approval in absence management. Return of all university assets, including any assets at home. Remove access to sensitive information and/or software, if applicable. All applicable P-card reconciliations and reimbursements. All applicable travel claims. Visit the EODA/HR Operations Off-boarding website for a complete checklist and separation details. This ticket will automatically close once all applicable assets are returned. If you have any questions, please respond to the email confirmation received after submission. |
| employee for any specific reason. If 'HEERA Manager Delegate' is selected, you will be asked to identify the HEERA Manager of the employee that is separating. Note: Once the form is submitted the form will route for HEERA Manager approval. | * Initiating the request None Employee HEERA Manager HEERA Manager Delegate EODA/HR Operations or ELR&C |

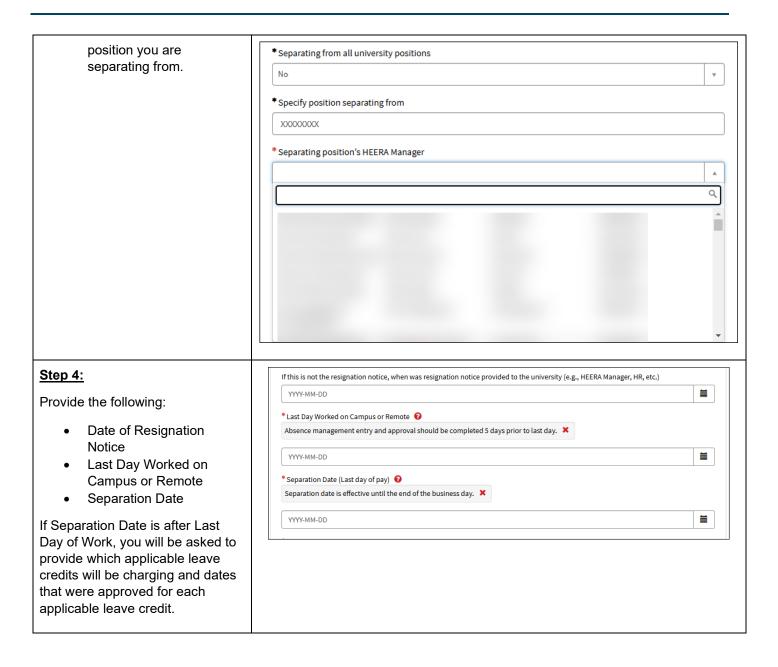
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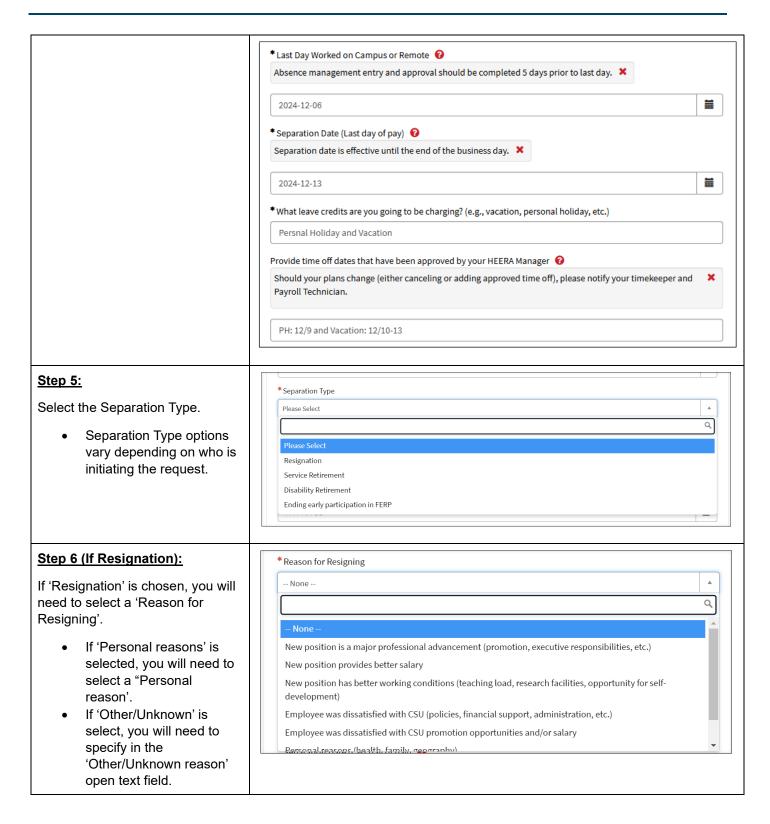
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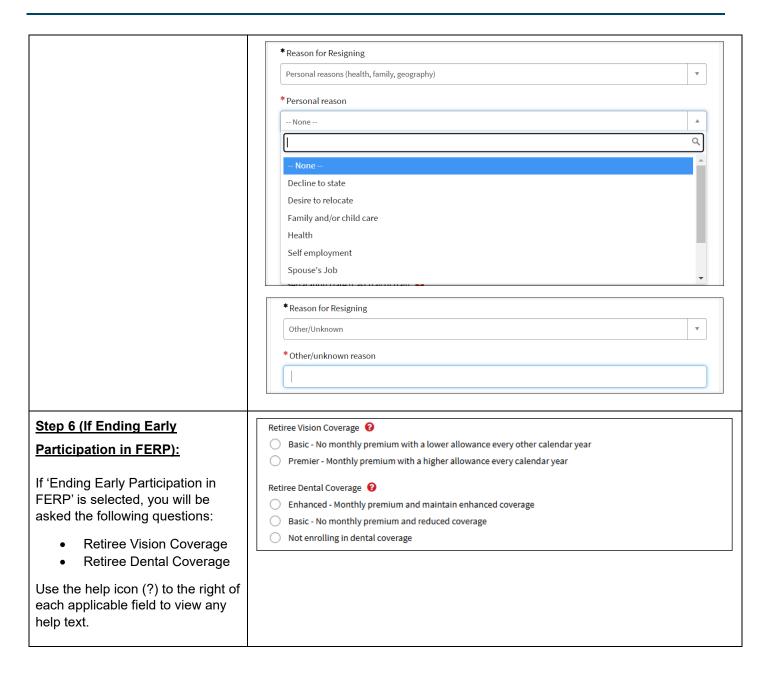
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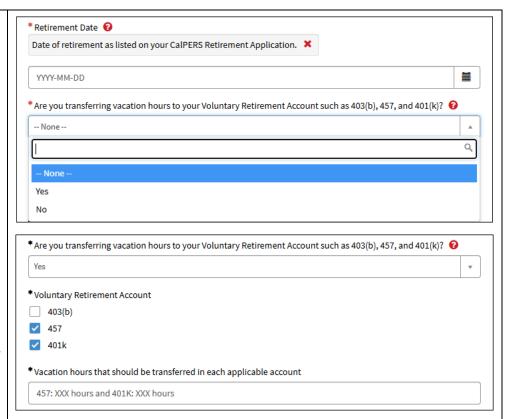


Step 6 (If Disability Retirement):

If 'Disability Retirement' is selected, you will be asked the following in addition to the Vision and Dental questions listed on step 6:

- Retirement Date As listed on your CalPERS Retirement Application.
- Are you transferring vacation hours to your VRA?
 - If 'Yes' is chosen, you will be asked to select which VRA account(s) and the amount for each account.

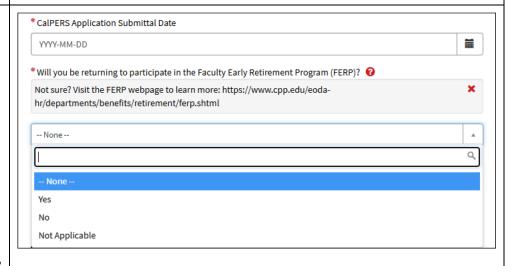
Use the help icon (?) to the right of each applicable field to view any help text.



Step 6 (If Service Retirement):

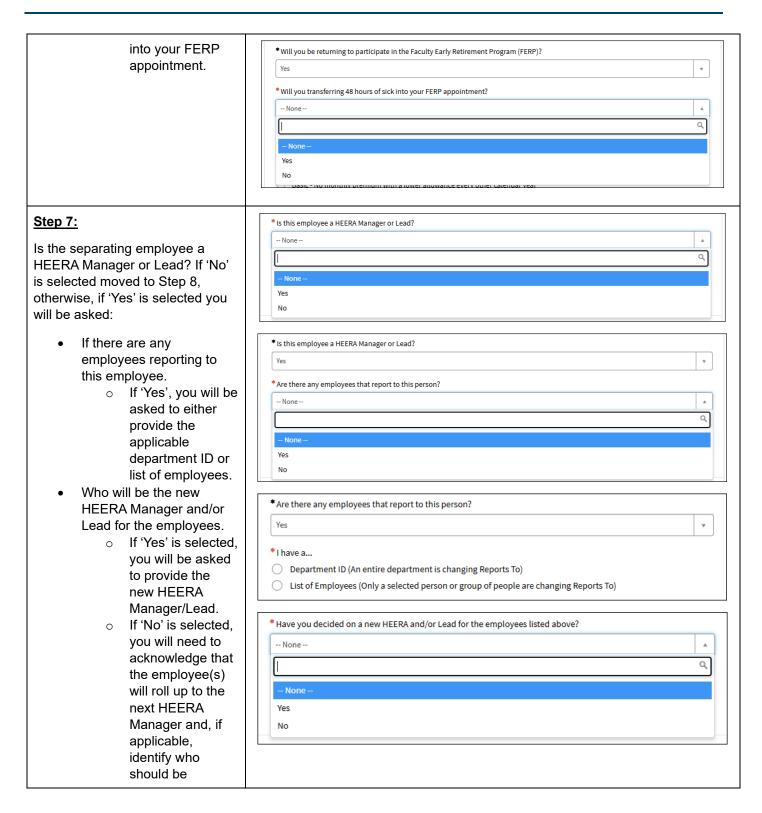
If 'Service Retirement' is selected, you will be asked the following question in addition to the questions listed step 6 and 7:

- CalPERS Application Submittal Date
- (Required for Faculty Only) Will you be returning to participate in the Faculty Early Retirement Program (FERP)?
 - If 'Yes' is selected, you will be asked if you will be transferring 48 hours of sick time



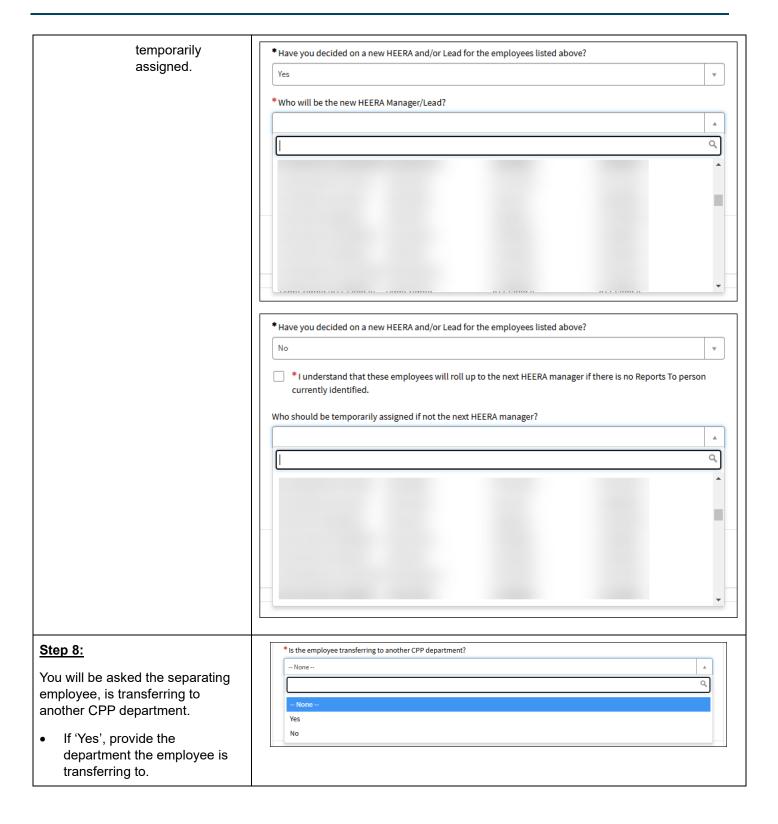
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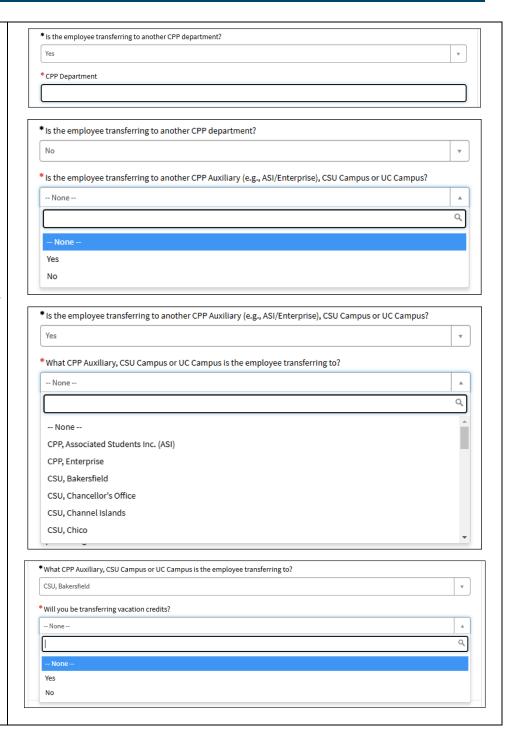


 If 'No' is selected, you will be asked if the employee is transferring to another CPP Auxiliary, CSU Campus, or UC Campus.

If transferring to another CPP Auxiliary, CSU, or UC campus, you will be asked to select the applicable auxiliary or campus.

> If a CSU campus is selected, you will be asked if you are transferring vacation credits. If so, how many.

Use the help icon (?) to the right of each applicable field to view any help text.



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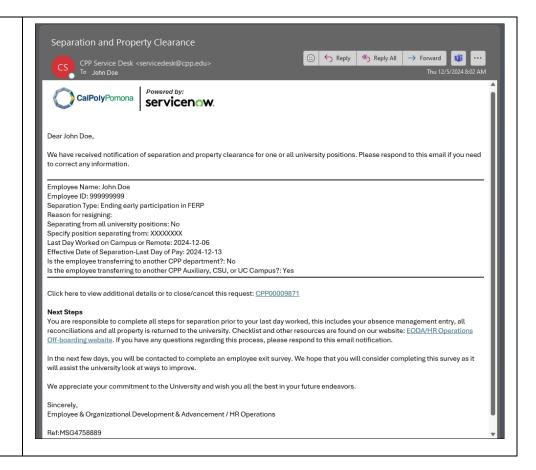
| Step 9 (If request is initiated by Employee and separating from all positions): You will be asked to acknowledge that your personal information has been updated. | *Will you be transferring vacation credits? Yes *Number of vacation hours being transferred *O I acknowledge that the employee personal information has been updated in PeopleSoft. Examples of personal information include but are not limited to: Phone Number Mailing Address Email Address For more information, please visit the PeopleSoft personal information page. *I acknowledge the above conditions. |
|--|--|
| Ste 10: Upload resignation letter (optional). Click the Upload button Navigate to the location of the file Select file Click 'Open' | Upload resignation letter |
| Step 11: Submit Employee Separation by clicking on the Submit button located on the top right of the screen. | Submit |

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Step 12:

Email notification sent to the employee that is separating.

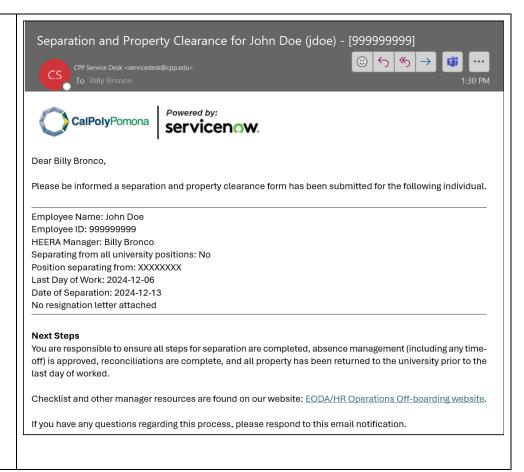


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Step 13A:

Email notification sent to HEERA Manager.



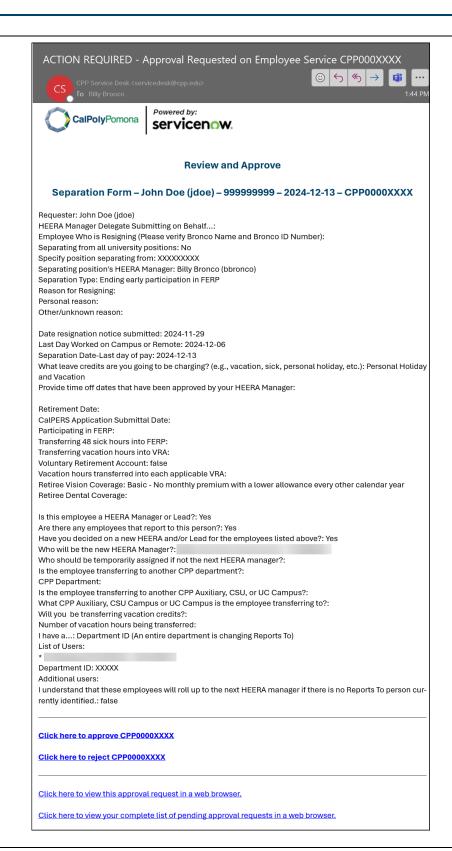
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Step 13B (Applicable only if form was submitted by a HEERA Manager Delegate):

If form was submitted by a HEERA Manager Delegate, HEERA Manager approval is required.

If approved, continue with the remaining steps. Otherwise, business process ends and ticket automatically closes.

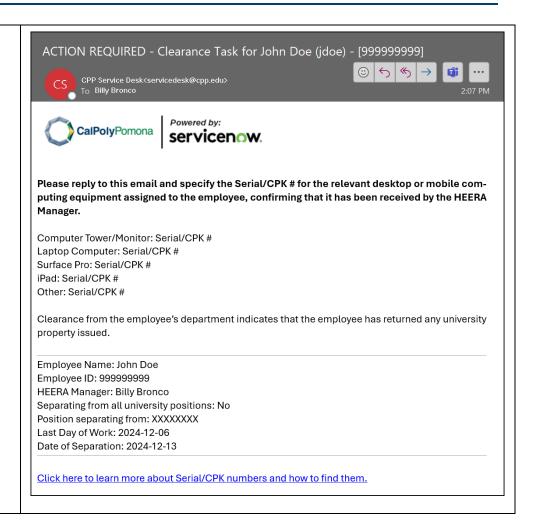


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Step 14 (ACTION REQUIRED):

Property Clearance Task sent to HEERA Manager to ensure the collection of desktop and/or mobile computing equipment



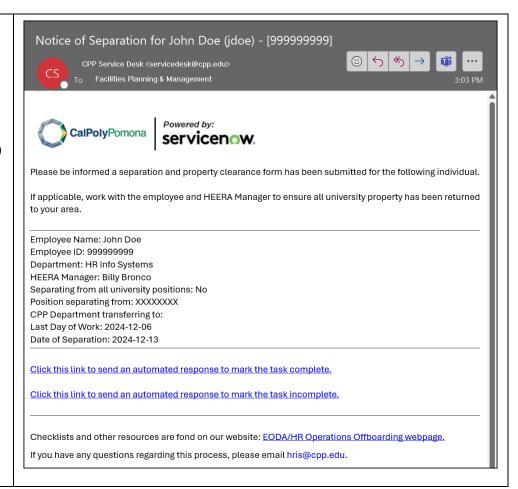
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Step 15:

Email sent to University Property Clearance Team to ensure university property is collected.

Note: Each Property Clearance area (ex: Parking, Key Control, Procurement, IT, Accounting, etc.) will receive their own email with a task to complete.

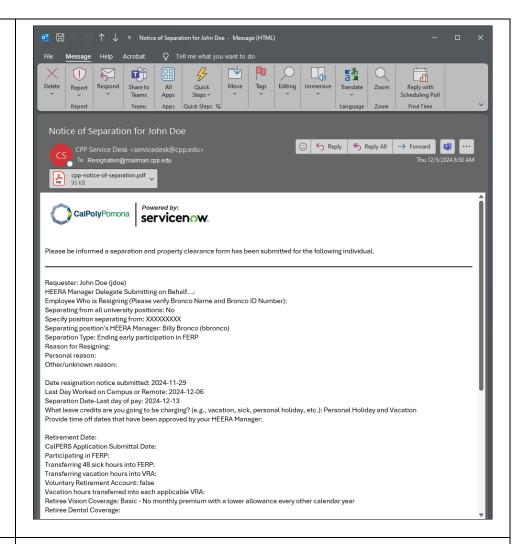


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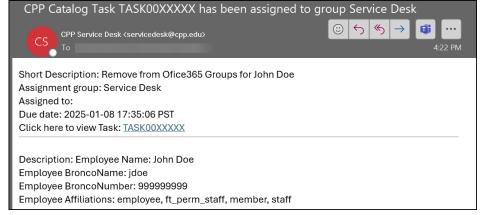
Step 16:

Email notification sent to EODA/HR Operations (e.g., Payroll, Benefits, etc.) and Employee Labor Relations & Compliance to ensure separation is processed timely and accurately.



Step 17 (Applicable only if employee is separating from all university positions)

IT tasks trigger 24 hours after Separation Date to ensure that access to information resources is removed at the end of employment.



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