Access to this user guide is available on the [EODA/HR Operations Offboarding Webpage](#).

Processing Step	Screen Shot
Step 1: Select who is initiating the separation (choose one): • **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 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.	## Separation & Clearance Form Initiate a CPP state-side resignation or retirement. 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. *** Requester** ⓘ [ ] ([ ]) *** Initiating the request** -- None -- [ ] 🔍 -- None -- Employee HEERA Manager HEERA Manager Delegate EODA/HR Operations or ELR&C

Step 2 (if you are not the Employee initiating the request): If you are not the employee separating, you will be asked to identify who is separating. • Refer to the 'Employee Information' section to verify that the correct employee was selected.	
Step 3: You will be asked if the employee is separating from all university positions. • If 'No' is selected, you will need to enter which position the employee is separating from. This could be the working title and/or position number. • If 'No' is selected **and you are the employee initiating the request**, you will need to select the HEERA Manager for the	

position you are separating from.	* Separating from all university positions No ▾ * Specify position separating from XXXXXXXX * Separating position's HEERA Manager ▲ 🔍
Step 4: Provide the following: • Date of Resignation Notice • Last Day Worked on Campus or Remote • Separation Date If Separation Date is after Last Day of Work, you will be asked to provide which applicable leave credits will be charging and dates that were approved for each applicable leave credit.	If this is not the resignation notice, when was resignation notice provided to the university (e.g., HEERA Manager, HR, etc.) YYYY-MM-DD 📅 * Last Day Worked on Campus or Remote ❓ Absence management entry and approval should be completed 5 days prior to last day. ✖ YYYY-MM-DD 📅 * Separation Date (Last day of pay) ❓ Separation date is effective until the end of the business day. ✖ YYYY-MM-DD 📅

Last Day Worked on Campus or Remote ❓

Absence management entry and approval should be completed 5 days prior to last day. ✖

2024-12-06 📅

Separation Date (Last day of pay) ❓

Separation date is effective until the end of the business day. ✖

2024-12-13 📅

What leave credits are you going to be charging? (e.g., vacation, personal holiday, etc.)

Persnal Holiday and Vacation

Provide time off dates that have been approved by your HEERA Manager ❓

Should your plans change (either canceling or adding approved time off), please notify your timekeeper and Payroll Technician. ✖

PH: 12/9 and Vacation: 12/10-13

Step 5:

Select the Separation Type.

- Separation Type options vary depending on who is initiating the request.

Separation Type

Please Select ▲

🔍

Please Select

Resignation

Service Retirement

Disability Retirement

Ending early participation in FERP

Step 6 (If Resignation):

If 'Resignation' is chosen, you will need to select a 'Reason for Resigning'.

- If 'Personal reasons' is selected, you will need to select a "Personal reason'.
- If 'Other/Unknown' is select, you will need to specify in the 'Other/Unknown reason' open text field.

Reason for Resigning

-- None -- ▲

🔍

-- None --

New position is a major professional advancement (promotion, executive responsibilities, etc.)

New position provides better salary

New position has better working conditions (teaching load, research facilities, opportunity for self-development)

Employee was dissatisfied with CSU (policies, financial support, administration, etc.)

Employee was dissatisfied with CSU promotion opportunities and/or salary

Personal reasons (health, family, geography)

	* Reason for Resigning Personal reasons (health, family, geography) ▾ * Personal reason -- None -- ▴ [search] 🔍 **-- None --** Decline to state Desire to relocate Family and/or child care Health Self employment Spouse's Job * Reason for Resigning Other/Unknown ▾ * Other/unknown reason [ ]
Step 6 (If Ending Early Participation in FERP): If 'Ending Early Participation in FERP' is selected, you will be asked the following questions: • Retiree Vision Coverage • Retiree Dental Coverage Use the help icon (?) to the right of each applicable field to view any help text.	Retiree Vision Coverage ❓ ◯ Basic - No monthly premium with a lower allowance every other calendar year ◯ Premier - Monthly premium with a higher allowance every calendar year Retiree Dental Coverage ❓ ◯ Enhanced - Monthly premium and maintain enhanced coverage ◯ Basic - No monthly premium and reduced coverage ◯ Not enrolling in dental coverage

Step 6 (If Disability Retirement):

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

- 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.

* Retirement Date ❓

Date of retirement as listed on your CalPERS Retirement Application. ✖

YYYY-MM-DD 📅

* Are you transferring vacation hours to your Voluntary Retirement Account such as 403(b), 457, and 401(k)? ❓

-- None -- ▲

🔍

-- None --

Yes

No

---

* Are you transferring vacation hours to your Voluntary Retirement Account such as 403(b), 457, and 401(k)? ❓

Yes ▼

* Voluntary Retirement Account

☐ 403(b)
☑ 457
☑ 401k

* Vacation hours that should be transferred in each applicable account

457: XXX hours and 401K: XXX hours

Step 6 (If Service Retirement):

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

- **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

* CalPERS Application Submittal Date

YYYY-MM-DD 📅

* Will you be returning to participate in the Faculty Early Retirement Program (FERP)? ❓

Not sure? Visit the FERP webpage to learn more: https://www.cpp.edu/eoda-hr/departments/benefits/retirement/ferp.shtml ✖

-- None -- ▲

🔍

-- None --

Yes

No

Not Applicable

into your FERP appointment.	*Will you be returning to participate in the Faculty Early Retirement Program (FERP)? Yes *Will you transferring 48 hours of sick into your FERP appointment? -- None -- -- None -- Yes No
Step 7: Is the separating employee a HEERA Manager or Lead? If 'No' is selected moved to Step 8, otherwise, if 'Yes' is selected you will be asked: • If there are any employees reporting to this employee. 　○ If 'Yes', you will be asked to either provide the applicable department ID or list of employees. • Who will be the new HEERA Manager and/or Lead for the employees. 　○ If 'Yes' is selected, you will be asked to provide the new HEERA Manager/Lead. 　○ If 'No' is selected, you will need to acknowledge that the employee(s) will roll up to the next HEERA Manager and, if applicable, identify who should be	*Is this employee a HEERA Manager or Lead? -- None -- -- None -- Yes No *Is this employee a HEERA Manager or Lead? Yes *Are there any employees that report to this person? -- None -- -- None -- Yes No *Are there any employees that report to this person? Yes *I have a... ○ Department ID (An entire department is changing Reports To) ○ List of Employees (Only a selected person or group of people are changing Reports To) *Have you decided on a new HEERA and/or Lead for the employees listed above? -- None -- -- None -- Yes No

temporarily assigned.	*** Have you decided on a new HEERA and/or Lead for the employees listed above?** Yes ▾ *** Who will be the new HEERA Manager/Lead?** [search field]
	* Have you decided on a new HEERA and/or Lead for the employees listed above? No ▾ ☐ *** I understand that these employees will roll up to the next HEERA manager if there is no Reports To person currently identified.** Who should be temporarily assigned if not the next HEERA manager? [search field]
Step 8: You will be asked the separating employee, is transferring to another CPP department. • If 'Yes', provide the department the employee is transferring to.	*** Is the employee transferring to another CPP department?** -- None -- ▾ -- None -- Yes No

- 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.

* Is the employee transferring to another CPP department?

Yes ▾

* CPP Department

_____

* Is the employee transferring to another CPP department?

No ▾

* Is the employee transferring to another CPP Auxiliary (e.g., ASI/Enterprise), CSU Campus or UC Campus?

-- None -- ▲

🔍

| -- None -- |
| Yes |
| No |

* Is the employee transferring to another CPP Auxiliary (e.g., ASI/Enterprise), CSU Campus or UC Campus?

Yes ▾

* What CPP Auxiliary, CSU Campus or UC Campus is the employee transferring to?

-- None -- ▲

🔍

-- None --
CPP, Associated Students Inc. (ASI)
CPP, Enterprise
CSU, Bakersfield
CSU, Chancellor's Office
CSU, Channel Islands
CSU, Chico

* What CPP Auxiliary, CSU Campus or UC Campus is the employee transferring to?

CSU, Bakersfield ▾

* Will you be transferring vacation credits?

-- None -- ▲

🔍

| -- None -- |
| Yes |
| No |

	* Will you be transferring vacation credits? Yes ▾ *** Number of vacation hours being transferred** ❓
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.	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 ⊕ Upload
Step 11: Submit Employee Separation by clicking on the **Submit** button located on the top right of the screen.	Submit

Step 12:

Email notification sent to the employee that is separating.

Separation and Property Clearance

CPP Service Desk <servicedesk@cpp.edu>
To John Doe

Thu 12/5/2024 8:02 AM

CalPolyPomona | *Powered by:* **servicenow**

Dear John Doe,

We have received notification of separation and property clearance for one or all university positions. Please respond to this email if you need to correct any information.

Employee Name: John Doe
Employee ID: 999999999
Separation Type: Ending early participation in FERP
Reason for resigning:
Separating from all university positions: No
Specify position separating from: XXXXXXX
Last Day Worked on Campus or Remote: 2024-12-06
Effective Date of Separation-Last Day of Pay: 2024-12-13
Is the employee transferring to another CPP department?: No
Is the employee transferring to another CPP Auxiliary, CSU, or UC Campus?: Yes

Click here to view additional details or to close/cancel this request: CPP00009871

Next Steps
You are responsible to complete all steps for separation prior to your last day worked, this includes your absence management entry, all reconciliations and all property is returned to the university. Checklist and other resources are found on our website: EODA/HR Operations Off-boarding website. If you have any questions regarding this process, please respond to this email notification.

In the next few days, you will be contacted to complete an employee exit survey. We hope that you will consider completing this survey as it will assist the university look at ways to improve.

We appreciate your commitment to the University and wish you all the best in your future endeavors.

Sincerely,
Employee & Organizational Development & Advancement / HR Operations

Ref:MSG4758889

Step 13A:	
Email notification sent to HEERA Manager.	**Separation and Property Clearance for John Doe (jdoe) - [999999999]** CPP Service Desk <servicedesk@cpp.edu> To Billy Bronco 1:30 PM **CalPolyPomona** | *Powered by:* **servicenow.** Dear Billy Bronco, Please be informed a separation and property clearance form has been submitted for the following individual. Employee Name: John Doe Employee ID: 999999999 HEERA Manager: Billy Bronco Separating from all university positions: No Position separating from: XXXXXXXX Last Day of Work: 2024-12-06 Date of Separation: 2024-12-13 No resignation letter attached **Next Steps** You are responsible to ensure all steps for separation are completed, absence management (including any time-off) is approved, reconciliations are complete, and all property has been returned to the university prior to the last day of worked. Checklist and other manager resources are found on our website: EODA/HR Operations Off-boarding website. If you have any questions regarding this process, please respond to this email notification.

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.

ACTION REQUIRED - Approval Requested on Employee Service CPP000XXXX

CPP Service Desk <servicedesk@cpp.edu>
To Billy Bronco   1:44 PM

CalPolyPomona | *Powered by:* **servicenow.**

Review and Approve

Separation Form – John Doe (jdoe) – 999999999 – 2024-12-13 – CPP0000XXXX

Requester: John Doe (jdoe)
HEERA Manager Delegate Submitting on Behalf...:
Employee Who is Resigning (Please verify Bronco Name and Bronco ID Number):
Separating from all university positions: No
Specify position separating from: XXXXXXXXX
Separating position's HEERA Manager: Billy Bronco (bbronco)
Separation Type: Ending early participation in FERP
Reason for Resigning:
Personal reason:
Other/unknown reason:

Date resignation notice submitted: 2024-11-29
Last Day Worked on Campus or Remote: 2024-12-06
Separation Date-Last day of pay: 2024-12-13
What leave credits are you going to be charging? (e.g., vacation, sick, personal holiday, etc.): Personal Holiday and Vacation
Provide time off dates that have been approved by your HEERA Manager:

Retirement Date:
CalPERS Application Submittal Date:
Participating in FERP:
Transferring 48 sick hours into FERP:
Transferring vacation hours into VRA:
Voluntary Retirement Account: false
Vacation hours transferred into each applicable VRA:
Retiree Vision Coverage: Basic - No monthly premium with a lower allowance every other calendar year
Retiree Dental Coverage:

Is this employee a HEERA Manager or Lead?: Yes
Are there any employees that report to this person?: Yes
Have you decided on a new HEERA and/or Lead for the employees listed above?: Yes
Who will be the new HEERA Manager?:
Who should be temporarily assigned if not the next HEERA manager?:
Is the employee transferring to another CPP department?:
CPP Department:
Is the employee transferring to another CPP Auxiliary, CSU, or UC Campus?:
What CPP Auxiliary, CSU Campus or UC Campus is the employee transferring to?:
Will you be transferring vacation credits?:
Number of vacation hours being transferred:
I have a...: Department ID (An entire department is changing Reports To)
List of Users:
*
Department ID: XXXXX
Additional users:
I understand that these employees will roll up to the next HEERA manager if there is no Reports To person currently identified.: false

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Click here to approve CPP0000XXXX

Click here to reject CPP0000XXXX

Click here to view this approval request in a web browser.

Click here to view your complete list of pending approval requests in a web browser.

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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ACTION REQUIRED - Clearance Task for John Doe (jdoe) - [999999999]

CS CPP Service Desk<servicedesk@cpp.edu>
To Billy Bronco   2:07 PM

CalPolyPomona | *Powered by:* **servicenow.**

Please reply to this email and specify the Serial/CPK # for the relevant desktop or mobile computing equipment assigned to the employee, confirming that it has been received by the HEERA Manager.

Computer Tower/Monitor: Serial/CPK #
Laptop Computer: Serial/CPK #
Surface Pro: Serial/CPK #
iPad: Serial/CPK #
Other: Serial/CPK #

Clearance from the employee's department indicates that the employee has returned any university property issued.

Employee Name: John Doe
Employee ID: 999999999
HEERA Manager: Billy Bronco
Separating from all university positions: No
Position separating from: XXXXXXXX
Last Day of Work: 2024-12-06
Date of Separation: 2024-12-13

Click here to learn more about Serial/CPK numbers and how to find them.

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.

Notice of Separation for John Doe (jdoe) - [999999999]

CPP Service Desk <servicedesk@cpp.edu>
To   Facilities Planning & Management   3:03 PM

CalPolyPomona | Powered by: **servicenow.**

Please be informed a separation and property clearance form has been submitted for the following individual.

If applicable, work with the employee and HEERA Manager to ensure all university property has been returned to your area.

Employee Name: John Doe
Employee ID: 999999999
Department: HR Info Systems
HEERA Manager: Billy Bronco
Separating from all university positions: No
Position separating from: XXXXXXXX
CPP Department transferring to:
Last Day of Work: 2024-12-06
Date of Separation: 2024-12-13

Click this link to send an automated response to mark the task complete.

Click this link to send an automated response to mark the task incomplete.

Checklists and other resources are fond on our website: EODA/HR Operations Offboarding webpage.

If you have any questions regarding this process, please email hris@cpp.edu.

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.	