



## EMPLOYEE CLEARANCE PROCEDURE

These instructions are to assist in completing the Employee Clearance form required when an employee terminates his or her active employment status from California State University, Long Beach. This process may also be appropriate for those employees going on an extended leave of absence, especially if there is a reasonable expectation that the employee will not return to work. Employee clearance is done to assure all university property and resources are recovered prior to an employee's last day physically worked. It is the fiduciary responsibility of the appropriate administrator that this occurs. Clearance is subject to external audit that obliges the university to install this process to protect its assets. Departments may be responsible for costs associated with failure to secure university property and resources upon the termination of an employee.

1. The department must first determine which of the clearance items/areas affect the separating employee. Any clearance item that does not apply to the employee can be denoted as "N/A" and signed an authorized departmental representative in lieu of obtaining a clearance signature or approval by the issuing department. If any item is waived, the department is taking financial responsibility should costs be incurred as a result of the waiver.
2. The department is responsible for assuring all university property including sensitive equipment that has been issued to the employee, is returned.
3. If moving costs have been paid by CSULB and the agreement requiring repayment of those costs for early resignation beyond the timeframe stipulated in the employee's letter of appointment has not been fulfilled, the Appropriate Administrator shall contact Staff or Academic Personnel for further instructions.
4. Each month all completed forms received by Payroll will be compared to a list of terminating employees, to assure compliance with this university requirement.
5. To simplify the process, certain areas will provide clearance by email, phone or fax. Please refer to the following details to clear each item. When an email, fax or verbal clearance is allowed, the authorized representative will sign to certify those items and attach the written documentation to the completed form. Individual offices have various service hours; please contact them for specific hours of service.

- Audio Visual Services (Applicable to Faculty only) – Liberal Arts Building 107. Return all audio equipment and obtain appropriate signatures. The clearance approval to certify that no equipment has been checked out by the faculty member may be obtained by email or fax. Contact via email: [avs-dist@csulb.edu](mailto:avs-dist@csulb.edu); fax: 5-7710.
- Library – Main Floor, Circulation Desk. All library materials must be returned and/or fines paid. The clearance approval to certify that no outstanding fines or library materials are due may be obtained by email or fax. Contact via email: [lib-clearance@csulb.edu](mailto:lib-clearance@csulb.edu); fax: 5-1703.
- Facilities Management – Located at the southeast corner of the campus facing Palo Verde. The employee or authorized department representative must return keys in person. If Facilities Management finds that all keys have not been returned by the employee's date of separation or transfer, the department will be charged a lost key fine for each key not returned. The per key fine is dependent on the security level of each key (minimum charge of \$100) Rekeying facilities is very expensive and may be necessary if a security breach is perceived. Note: If the employee also has an IFIS account, this should be terminated by notifying [fm-admin@csulb.edu](mailto:fm-admin@csulb.edu); fax: 5-8723.

- Information Technology Services – Brotman Hall 188. Upon separation from the University, the appropriate areas will need to cancel access to computing privileges granted to employees including access to email accounts. Employees must also return any issued telephone calling card. The appropriate administrator or designee may do this on the employee's behalf. Contact the ITS front office directly by calling 5-5459 or email

[ITS-Clearance@notesmail.csulb.edu](mailto:ITS-Clearance@notesmail.csulb.edu) to have ITS clear the employee. This can be done in person or also by fax:

5-8855. If an employee is authorized to receive emeriti status, this section can be waived.

- Financial Management Information Systems – Brotman Hall 155. Upon separation from the University, the employee's access to PeopleSoft Financials and CS Link (Financials) will need to be cancelled. Requests for cancellation of the employee's access and confirmation that access has been cancelled can be obtained by sending an email to [fishelpdesk@notesmail.csulb.edu](mailto:fishelpdesk@notesmail.csulb.edu). Confirmation that access has been cancelled will serve as clearance approval.

Note: Access to the Human Resource and Student Administration systems is monitored weekly for changes. If you want to proactively contact those areas, you can email [hr-mgmt@notesmail.csulb.edu](mailto:hr-mgmt@notesmail.csulb.edu) for HR and [jbautist@csulb.edu](mailto:jbautist@csulb.edu) for SA.

- Bursar's Office – Brotman Hall 155. Make sure all outstanding accounts have been cleared, including student account receivables and dishonored check receivables. Contact via email: [Bursar'sOffice.Clearances@notesmail.csulb.edu](mailto:Bursar'sOffice.Clearances@notesmail.csulb.edu); phone: 5-8281.

- Controller's Office/Accounts Payable and Travel – Foundation Building 280. Make sure all outstanding accounts have been cleared, including salary, travel advances and the termination of the American Express Corporate Card. Contact via email: [fisap@notesmail.csulb.edu](mailto:fisap@notesmail.csulb.edu); fax: 5-1702.
- Parking, Transportation and Event Services – Located on Merriam Way next to Parking Structure One. Employees may turn in parking permit at PT&ES or at Payroll Services in Brotman Hall 344. Pre-tax parking payroll deduction will automatically be ceased. Employees who pay for permits on a semester or academic year basis may be eligible to receive a refund by returning the unexpired permit to the Cashier's Office located in Brotman Hall 148.
- Purchasing Office –Brotman Hall 346. If the employee has been issued a procurement card, it must be returned to purchasing prior to the employee's last day worked. To return a procurement card, the manager can either (1) have the employee physically take the card to Purchasing and obtain the appropriate signature, or (2) obtain the card from the employee and return it to Purchasing (and sign the form). If the card is sent via intercampus mail, it is recommended that the card be cut twice: once across the magnetic strip and again, across the numbers to make them unreadable.
- Conflict of Interest – Exit Filing For those positions with requirements to disclose financial interests, there is a legal requirement to disclose upon separation of employment with the university. This is required to denote any changes that may have occurred in the employee's financial position and or acceptance of gifts since the last filing period. If you have never filed a Form 700: Statement of Economic Interests during your employment at CSULB, this section will most likely not apply to you. If this is a requirement for your position, completed forms must be presented to the campus' Conflict of Interest Officer upon separation of your employment. If you want to confirm the applicability of this requirement to you, contact [hr-mgmt@notesmail.csulb.edu](mailto:hr-mgmt@notesmail.csulb.edu) to see if this law affects your position.
- Extended Leave – Typically, extended leave refers to time away from the work force where no specific agreement exists for the employee's return that would leave one to believe the employee may never come back.

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*The Appropriate Administrator/Department Head should share the following information with the exiting employee:*

#### **RETIREMENT CONTRIBUTIONS**

If you were a CalPERS member, your contributions and interest earned are refundable to you upon request. You are not required to withdraw your funds. You may leave your funds on deposit and they will continue to accrue interest, but no further service credit will be accrued nor will the member be vested for retirement benefits until additional qualifying service credit is earned. A member is fully vested with 5 years of CalPERS credited service. If you have 5 years of CalPERS service **and** are age 50, you may be eligible for retirement and retiree health and dental benefits. To check your eligibility, contact Benefits Services at (562)985-2381 or CalPERS at (888)225-7377 within 120 days of your separation from the university. If you are not vested or eligible to retire from CalPERS and choose to withdraw your contributions you may contact CalPERS at (888)225-7377.

If you have contributed to Part-Time, Seasonal, Temporary Plan (PST) and your account balance is less than \$5,000, you must request a withdrawal of your funds. You will receive a lump sum payment and income taxes will be withheld for balances between \$2,500 - \$5,000. Balances exceeding \$5,000 may be transferred to another employer-sponsored 457 Deferred Compensation Plan. For more information on withdrawing your contributions contact the Savings Plus Program at (866)566-4777 or at [www.sppforu.com](http://www.sppforu.com).

As a result of changes in the law under the Federal Tax Reform Act of 1986 and conforming State of California Legislation, early distributions from qualified retirement plans are subject to federal and state taxes, in addition a 10% penalty tax may apply.

#### **INSURANCE COVERAGE**

If you have insurance coverage through the University, your coverage will end on the last day of the month for which premiums are paid - usually the month following that in which your employment terminates. You are eligible for a Group Continuation Plan (COBRA) upon termination of group coverage. Contact Benefit Services for more information at (562)985-2120.

#### **EDD**

You may wish to contact your local Employment Development Department (EDD) regarding unemployment eligibility. To locate the nearest EDD office, please refer to the Government Pages of your local telephone book.

#### **CONFIDENTIAL INFORMATION**

You are reminded of your continuing responsibility to maintain the confidentiality of information to which you may have had access during your employment.