

EMPLOYEE SEPARATION FORM

All employees separating from Cal Poly employment must complete the Payroll Form 300. Please also complete and sign the Employee Personal Checklist on the back of this form.

| | |
|-----------------------|------------------------------------|
| EMPLOYEE NAME: | EMPLOYEE ID: |
| DEPARTMENT: | LAST DAY PHYSICALLY WORKED: |

MAIL FINAL CHECK? YES NO (IF W-2 MAILING ADDRESS IS CHANGING ALSO COMPLETE EMPLOYEE ACTION REQUEST):
ADDRESS TO MAIL FINAL CHECK:

REASON FOR SEPARATION:

- | | | |
|--|--|---|
| <input type="checkbox"/> Resignation (Staff/MPP attach HR191 Form) | <input type="checkbox"/> Retirement | <input type="checkbox"/> End of FERP Contract |
| <input type="checkbox"/> End of Temporary Assignment (not returning) | <input type="checkbox"/> Other (please specify): | |

TO BE COMPLETED BY FACILITY SERVICES AND/OR CAL POLY POLICE

KEYS

To be completed by Facility Services (Bldg. 58):

I verify that all State keys issued to this employee have been returned to Facility Services.

Facility Services Representative Signature: _____ Date: _____

NOTE: Employees who have lost their State keys must file a report with the Cal Poly Police.

IF KEYS ARE NOT BEING RETURNED, DEPARTMENT MUST AUTHORIZE BELOW

This employee has filed a lost key report with Cal Poly Police (if applicable).

Cal Poly Police Representative Signature: _____ Date: _____

TO BE COMPLETED BY EMPLOYEE/DEPARTMENT

- **I certify that all State property has been returned and outstanding debts have been paid.**
- **I understand I have ongoing responsibilities for maintaining the confidentiality of university information.**

Employee Signature: _____ Date: _____

Yes Employee has returned campus Identification Card (attached to this form or if not, give reason)

Yes **N/A** Employee has returned all department-issued property and equipment

Yes **N/A** Employee has returned Cal Poly Procurement Card to department

Yes **N/A** Cal Poly Travel Credit Card(s) returned to Procurement Office (Adm. 128)

Yes **N/A** Employee has been authorized to retain State keys at this time

Yes **N/A** Library fines and personal telephone charges paid to State Cashier (Adm 131E)

Yes **N/A** All Salary Advances extended to me by Cal Poly have been settled

Yes **N/A** If faculty member is requesting an early settlement, Payroll Form 192 has been completed and submitted to Academic Personnel (a copy retained in department).

Yes **N/A** Employee read Cal Poly's Email Retention Standard and disposed of/transferred email as required.

Depart Head/Chair/Director Signature: _____ Date: _____

Department OR employee – please forward completed Payroll Form 300 to Payroll Services

EMPLOYEE SEPARATION CHECKLIST

Please review each item and verify compliance by signing at the bottom of this page.

- Contact Transportation and Parking Services for **parking** fee refund (Bldg. 36) if not on payroll deduction
- Return **Library materials** to Library Circulation Desk
- Enter all final leave hours online through Absence Management Self Service
- If you received a **travel and/or moving expense advance** contact Accounts Payable (Adm 129 or 6-2291)
- Review your **payroll deductions** and arrange for alternative payment or cancellation if necessary:
 - Parking: To cancel your payroll deducted parking permit, submit an update via the "My Job Tasks" portlet. CAUTION: your parking permit will be promptly deactivated upon completion.
 - United Way: Complete a form deleting the deduction at Payroll Services.
 - Cal Poly Fund (donations to your department, scholarships, Athletics, etc.): contact Advancement Services at 756-1555.
 - Tax Deferred Plans – Complete Payroll Form 193 if requesting tax deferred monies from separation pay.
 - CalPERS Long Term Care: contact CalPERS at 888-225-7377.
 - Employee-paid Life and/or Disability Insurance: contact the carrier
 - Loan Payments
- Contact Human Resources regarding your **insurance** and **retirement** benefits:
 - COBRA: You will be losing your group **insurance** benefits upon separation. "COBRA" allows you to extend your group insurance(s) by paying the total premium (Employer and Employee share). Information will be mailed to you, but can also be obtained on Human Resources website, or by speaking to a Benefits Representative at (805) 756-2236.
 - Special consideration should be made for **HCRA** and **DCRA** enrollees to assure non-forfeiture of funds currently on deposit.
 - You may have **retirement** funds on deposit with CalPERS, PST, or UCDC retirement plans. Separation forms for each plan are available from Human Resources. Please contact a Benefits Representative to review your options.
- Review and implement campus guidelines to ensure proper handling of university information in your possession. (<http://security.calpoly.edu/content/practices/data-disposition-guidelines>).
- Complete your exit interview with ExitRight.
 - ExitRight is an external company that conducts exit interviews on behalf of Cal Poly - SLO. In the next few days you will receive an email from exitright@hdsdmetrics.com to complete an online survey regarding your experience with Cal Poly – SLO. Responses are confidential and will not impact any future employment with Cal Poly - SLO
 - Please be sure your HR representative has your most current phone number and address.

I have reviewed the above items and handled all necessary arrangements

Name: _____ Signed: _____

Return to Payroll Services along with Payroll Form 300