



## Clearance Request Instructions for All Faculty & Staff

**Purpose:** Departing employees must go through the clearance process when separating from the university. The clearance process includes steps for employees to update their current mailing address for receiving future tax forms, provide a personal email address, return university property, and pay potential fines.

**Important:**

- This form is to be completed by the supervisor or business manager.
- The person who completes the form must confirm if the separating employee is being hired by another state agency.
  - Correct termination dates are important for transfers to ensure continuation of benefits.
  - Certain leave balances may be eligible for transfer to another agency.
- This form should NOT be used in the following circumstances:
  - An employee is moving from one department to another within W&M or VIMS
  - An employee is moving between W&M and VIMS.
  - An employee is terminating one (overload) job but still has another active job. (In this case, a PAF should be submitted to terminate the overload job.)
- The employee will not receive payment for any leave balances until the clearance process has been completed.

*If this is an involuntary exit, HR should be involved long before the employee's departure. If you have any questions about completing a clearance, please contact [AskHR@wm.edu](mailto:AskHR@wm.edu) prior to completing this form.*

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### Steps for Completing Clearance Request:

1. Go to <https://hronline.wm.edu>.
2. Click **Login** and enter your W&M credentials.
3. Under the **Employment category**, click **Complete Clearance Form**.
4. Enter the **Banner ID (93#)** for the departing faculty or staff member. Then, click in the **First Name** field to auto-populate the rest of the employee's information.

Banner ID:	<input type="text"/>
First Name:	<input type="text"/>
Middle Initial:	<input type="text"/>
Last Name:	<input type="text"/>
Department:	<input type="text"/>
Position Number:	<input type="text"/>

5. Click the radio button to indicate if person is or is not still currently employed.

Is the person still currently employed with the university?
<input type="radio"/> Yes <input type="radio"/> No

6. Enter the **Effective date of termination**. This is the last day the employee will be on an active or leave status in payroll.
- Salaried employee example:** The employee will work until March 9<sup>th</sup> (the end of the pay period). The effective date of termination should be entered as March 9<sup>th</sup>. The pay date for that pay period is March 16<sup>th</sup>.
  - Hourly employee example:** The employee will work until February 15<sup>th</sup> (the end of the pay period). The effective date of termination should be entered as February 15<sup>th</sup>. The pay date for that pay period is March 1<sup>st</sup>.
  - Retiring employee example:** The employee is retiring effective November 1<sup>st</sup>. The effective date of termination should be the last day in October that the employee is at work or on paid leave.
  - December (non-retirement) example:** The employee is separating (but not retiring) prior to winter holidays and will not be returning in January. The effective date of termination should be entered as the last day worked or on paid leave prior to the holiday. The employee will not be paid for the holidays.
  - December (retirement) example:**

**A staff member or 12-month faculty member** is retiring effective January 1<sup>st</sup> and is at work or on paid leave up until the winter holidays. The effective date of termination should be December 31<sup>st</sup>. The retiring employee will be compensated for the holidays through December 31<sup>st</sup>.

**A 9-month faculty member** retiring at the end of fall semester should have an effective date of termination of December 24<sup>th</sup>. Because 9-month faculty have a portion of their pay withheld each pay period during the academic year, they will receive a lump sum payment in January of pay that was deferred during the fall semester.

Effective date of termination?

If there are unusual circumstances surrounding the clearance, please provide an explanation in the Comments box.

7. Click the dropdown menu to indicate a **Reason for Departure**.

Reason for Departure:

8. Click the radio button to indicate if the person has taken leave that has not been properly reported. All leave must be properly recorded prior to the last day on payroll so that leave balances are paid out appropriately. Please attach any manual timesheets to correct leave balances.

Please review for accuracy the leave balances of any classified, operational, or professional employee. Has the employee taken any leave that has not been properly reported? If yes, please attach any manual timesheets.

Yes     No

9. Click to confirm the statement about collection of university property:

I am confirming that I, or a departmental representative, have collected or will collect the separating employee's keys, ID card, credit cards, and any other university property that the employee has or had in possession as appropriate.

(All property purchased by the university, including grant funds, remains university property.)

10. Click the radio button to indicate if the person is or is not a **timesheet approver**. If there will be more than one new timesheet approver, please attach a "Supervisor and Time Sheet Changes" form.

Is the employee a timesheet approver:  Yes  No

New Approver's 93#:

11. Use the **Comments** box to indicate any important details relevant to the person's departure.

Comments:

12. If the person provided a **resignation letter or manual timesheet(s)**, click the **Attachment button** at the bottom of the form to attach to the Clearance request. Otherwise, click **Submit** to complete the Clearance request.

If you have a resignation letter or manual timesheet(s), please use the Attachment button below to attach to the request. Click Submit when finished.