



Clearance Request Instructions for all Faculty & Staff

IMPORTANT:

- This form is to be completed by the supervisor, business manager, or HR liaison and should not be completed by the employee.
- This process replaces the paper clearance form for faculty and staff and the separation PAF
- This form should not be used if an employee is transferring to a department within W&M or to the Virginia Institute of Marine Science (VIMS).
- The employee's leave payoff check or contract payout will be withheld until the clearance process is completed.

If this is an *involuntary* exit, please contact HR prior to completing this form.

Steps for completing an online Cherwell clearance request

- Navigate to hronline.wm.edu.
- Click Login and enter your W&M credentials.
- Under the Employment category, click Complete Clearance Form.

Employment

[Complete Clearance Form](#)

- Enter the Banner ID (930#) for the departing Faculty, Staff, or Graduate Assistant, then click in the First Name field to auto-populate 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"/>

- First Name, Middle Initial, Last Name, and Department should auto-populate.
- Click radio button to indicate if the person is/is not still currently employed.

Is the employee still currently employed with W&M? Yes No

- Enter the employee's Last Day Worked and Effective Date of Termination.

Last day worked?

Effective date of Termination?

- Click the radio button to indicate if the Faculty member is/is not retiring with Emeritus status.

Faculty member retiring with Emeritus status? Yes No

- Click the drop down arrow to indicate the Reason for Departure.

Reason for Departure:

- Indicate if the employee has taken leave that has not been properly reported.

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?

Yes No

- Click to confirm: I, or a departmental representative, have collected or will collect the separating employee's keys, ID card, credit cards, and any other College property that he/she has or had in his/her possession as appropriate.

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 College property that he/she has or had in his/her possession as appropriate.

- Click the radio button to indicate if the person is/is not a Timesheet Approver and HR Liaison. If they are, indicate the email address for the person that will replace them.

Is the employee a Timesheet Approver:

Yes No New Approver's Email:

Is the employee a HR Liaison:

Yes No New Liaison's Email:

- Type any additional notes/comments that are important or relevant to the person's departure.

Comments:

- If the person provided a resignation letter, 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, please use the attachment button below to attach to the request. Click Submit when finished.

- After clicking Submit, your form changes to show the following:

Requester: Jane Smith	Request Description:
Request ID#: 1940	Employee Clearance form has been submitted.
Created: 11/1/2017	
Current Status: New	Full Name:
Category: Outprocessing	Banner #:
Sub-Category: Clearance Form	Status:
Thank you for submitting your request. A member of Human Resources will contact you soon.	

After the Clearance Request Submission

- The person which submitted the Clearance Request will receive an email outlining the steps the departing employee will take to obtain clearance:

The employee will receive an email shortly with the following instructions:

- Go to <https://personalinfo.wm.edu/> to update and verify his/her mailing address;
- Ensure that he/she has returned university property and/or paid fines he/she may owe (see attachment for details); and
- Acknowledge that he/she has complied with the clearance process;
- List an alternate (personal) email address using a web link that is provided to him/her.

- Once the departing employee completes the steps mentioned above, each required department is notified of the employee's separation, and clearance approval is then requested from the required departments.
- Each required department approves or denies clearance. If clearance is denied the required department must list the reason(s) for the denial.
- HR then oversees the Clearance request until all approvals are obtained. Once approvals are obtained from all required departments, the process is complete.

If you have questions or concerns please contact HR at askhr@wm.edu.