

SEPARATION/TERMINATION CHECKLIST PROCEDURES

This checklist should be initiated only by the home department and upon receipt of a written notice of resignation or termination.

The following procedures **must** be completed for all separating/terminating employees except students, grads and temporary hourly employees.

If employee is transferring to another department on campus, it is still necessary to complete all sections on this form, except Section III-a. It is not necessary to meet with Human Resources regarding insurance, etc. if the employee is remaining on campus.

I EMPLOYEE INFORMATION (to be completed by home department)

Name: _____ Today's Date: _____

Last 4 digits Banner ID#(i.e. -xxx1111): _____ (For security purposes, please **DO NOT** use SSN)

Date of Separation/Termination: _____

Employing Department: _____

Please check if the employee is transferring to another department on campus with a break in service of less than 5 working days

II EMPLOYING DEPARTMENT RESPONSIBILITIES:

a) Acknowledgement of receipt of written notice of resignation or termination: On ____/____/____ I received from the employee listed above a written letter of resignation or notice of termination that specifies an effective date of ____/____/____. A copy of the notice of resignation or termination will be sent to Human Resources and an Electronic Personnel Action Form (EPAF) submitted.

Department Representative Signature

Date

b) Please send an e-mail to termchecklist@listserv.montana.edu and include the information from Section I above – Name, Department, last 4 digits of their Banner ID#, Date of Separation/Termination, and note if the employee is transferring to another department on campus. For privacy reasons, please **do not** include the employee's reason for leaving in the e-mail.

c) Process an Electronic Personnel Action Form (EPAF) using the effective date of separation. A copy of the notice of resignation or termination should be sent to Human Resources.

d) Provide this checklist to the employee to complete the Employee Responsibilities listed below in the Section III.

III EMPLOYEE RESPONSIBILITIES

All separating employees must submit a written notice of resignation or termination that includes an effective date to his/her immediate supervisor and copy the appropriate department representative responsible for processing Electronic Personnel Action Forms. This Separation/Termination Checklist must be initiated and signed by a representative of the home department who can attest to having received a written notice of resignation or termination.

Additionally, all separating employees must obtain signatures from the Facilities Services, University Police, University Business Services, and Human Resources regarding the following items:

a. University Police, Huffman Building

All traffic fines must be paid before you separate from the University. This signature verifies that you have paid all traffic fines.

University Police Representative

Date

(For University Police Use Only)

Parking Due \$ _____

b. Facilities Services, Plew Building (6th Ave. and Grant St.)

All keys issued to you must be returned to Facilities Services. This signature verifies that no keys remain checked out under your name. You understand that failure to return keys upon termination of your employment at MSU may result in their being considered stolen property and being reported to the proper authorities. Please see http://www.facilities.montana.edu/fs/admin/key_requests.html for key return hours.

Facilities Services Representative

Date

c. University Business Services, Montana Hall

The University Business Services located in Room 103 Montana Hall will check you out of the following areas:

Student Accounts _____

P Card _____

Loan Service Center _____

Travel _____

University Business Services Officer

Date

d. Human Resources, Room 18 Montana Hall

Human Resources is required by State Law to explain employee’s options to continue health insurance coverage through the COBRA plan.

I have been advised of my options to continue health insurance coverage through the COBRA plan.

Employee Signature

Date

Human Resources

Date

I participate in the Optional Reimbursement Account:

I give Human Resources permission to deduct the remaining balance of my yearly election from my last paycheck:

Employee Signature

Date

Human Resources will also provide the information you need regarding:

- Direct Deposit
- Final Check Distribution
- Life Insurance
- Final pay of annual leave and/or sick leave

- Retirement
- Obtaining forwarding address for W2
- Confidential Exit Questionnaire

<https://www.montana.edu/hr/postemploy/>

The COMPLETED checklist must be returned to the home department on or before the final day of work. The home department must submit the letter of resignation or notice of termination to Human Resources once the Electronic Personnel Action Form (EPAF) has been created.

◆◆◆◆ REMINDERS ◆◆◆◆

Did you remember to empty your intramural locker, return library books, return phone cards, and pay any outstanding personal charges including CatCard?

In special circumstances, ITC can temporarily forward your campus email to another account. To request email forwarding, contact the ITC Help Desk at 994-1777.