



Separation/Termination Checklist Procedures

This checklist should be initiated only by the home department and upon receipt of a written notice of resignation/termination. The following procedures must be completed for ALL separating/terminating employees **EXCEPT** *students, grads, and temporary hourly employees*.

NOTE - for *student employees, grads, and temporary employees*. An email should be sent to termchecklist@listserv.montana.edu with the information itemized below in *Section I and Section II acknowledgment*. If special instructions are required for their employee mailbox, please note the instructions in the e-mail.

If the employee is *transferring* to another department on campus, it is still necessary to complete all sections on this form, **EXCEPT** *Section II a)&e*). It is **NOT** necessary to meet with Human Resources regarding insurance, etc. if the employee is remaining on campus.

I. [Section I: Employee Information \(to be completed by home department\)](#)

Name: _____ Today's Date: _____

Last 4 digits Banner ID# (i.e. -xxx1111): _____

Employee NetID: _____

Employee Email: _____

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:

Please send an e-mail to termchecklist@listserv.montana.edu and include the following information from above: Name, Employing Department, Last 4 digits 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.

II. [Section II: Employing Department Responsibilities](#)

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 __/__/__.

An Electronic Personnel Action Form (EPAF) has been submitted using the effective date of separation and a copy of the notice of resignation/termination will be sent to Human Resources hrrservicecenter@montana.edu.

 Department Representative Signature

 Date:

DocuSign Routing Instructions

- Home Department starts checklist in DocuSign. Home Department completes *Section I Employee Information* and *Section II Acknowledgement*. Employee fills out designated information *Section II b)&c*).

- 2. Home Department Routes in DocuSign for Signatures:
 - a) University Police: *DocuSign Signature field ONLY necessary if employee is leaving MSU entirely.*
 - i. MSU Parking Services parkingservices@montana.edu.
 - b) University Business Services:
 - i. Business Services 1: Marcia Fuller marcia.fuller@montana.edu (Student Accounts and Loan Service Center)
 - ii. Business Services 2: pcard@montana.edu (P Card and Travel)
 - c) Facilities Services:
 - i. Olivia Hayes olivia.hayes1@montana.edu
 - d) Cat Card Office:
 - i. catcard@montana.edu
 - e) University Human Resources: *DocuSign Signature fields ONLY necessary if employee is leaving MSU entirely.*
 - i. Human Resources: msubenefits@montana.edu
 - ii. Employee: Employee's Email Address
- 3. CC' hrrservicecenter@montana.edu on DocuSign for filing

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:

Parking Due: \$ _____

b) University Business Services, Montana Hall

I have a Purchasing Card with Montana State University: Yes No

I have traveled recently on behalf of Montana State University: Yes No

Student Accounts: _____

P Card: _____

Loan Service Center: _____

Travel: _____

University Business Services Officer

Date:

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

I have keys to return to the Plew Building: Yes No

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.montana.edu/university-services/fs/campus-key.html> for key return hours.

Facilities Services Representative

Date:

d) [Cat Card Office, Hedges Complex Rm 31](#)

The Cat Card Office has acknowledged this separation.

Cat Card Officer

Date:

e) [University Human Resources \(920 Technology Blvd. Suite A\)](#)

Please schedule a WebEx or in-person visit to Human Resources at 920 Technology Blvd. Suite A via email (msubenefits@montana.edu) to meet with a Benefit Associate to review your termination checklist. University Human Resources is required by State Law to explain employee's options to continue health insurance coverage through the COBRA plan.

I participate in the Optional Reimbursement Account: Yes No

I give University Human Resources permission to deduct the remaining balance of my yearly election from my last paycheck: Yes No

University Human Resources consulted with the employee regarding the COBRA Plan:

Yes No

University Human Resources will also provide the information you need regarding:

- Direct Deposit Retirement
- Final Check Distribution Obtaining forwarding address for W2
- Life Insurance Final Pay of annual leave and/or sick leave

Employee Signature

Date:

University Human Resources Signature

Date:

III. [Section III: Employee Responsibilities](#)

- a. All separating employees must submit a written notice of resignation or termination that includes an effective date to their 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.
- b. Empty any lockers you may have, pay outstanding personal charges, return MSU cards, and library books.
- c. In special circumstances, UIT can temporarily forward your campus email to another account. To request email forwarding, contact the UIT Help Desk at 994-1777 helpdesk@montana.edu. MSU Retiree Association: <http://www.montana.edu/retired/>.

REMINDERS

The completed checklist, and letter of resignation/notice of termination must be returned to Human Resources hrrservicecenter@montana.edu **on or before the final day of work**. The home department is responsible for creating the Electronic Personnel Action Form (EPAF) prior to sending the information over to Human Resources.