

Montana State University

Trainee and Fellowship Appointment TERMINATION/MODIFICATION Form Instructions and Information

1. The terminating/modifying department will initiate a “Trainee and Fellowship Appointment TERMINATION/MODIFICATION” using the form link on the UBS Forms website <https://www.montana.edu/ubs/forms.html>. This form link will initiate a secure DocuSign package that the initiator will be able to view in their DocuSign account.
 - a. Required signatories include:
 - i. OSP/VP RED (4W, 4WA, 436/7/8) funded Trainee and Fellowships:
 1. Student
 2. PI
 3. OSP Fiscal Manager
 - ii. Non-OSP funded Trainee and Fellowships:
 1. Student
 2. Fund Authority
 3. Department Head/Director (might be the same as the Fund Authority)
2. Completed forms will be received by the following groups:
 - a. The completed Trainee/Fellowship Appointment Termination/Modification form will be received by fellowships@montana.edu as a DocuSign initialer. The staff monitoring fellowships@montana.edu will ensure that the Trainee/Fellowship Appointment Termination/Modification form has been accurately completed and will reassign their “initialing” role to the appropriate FSS team member or departmental accountant for processing.
 - b. A copy of the completed Trainee/Fellowship Appointment Termination/Modification form will be received by Financial Aid.
 - c. A copy of the completed Trainee/Fellowship Appointment Termination/Modification form will be received by the Grad School to ensure that tuition is reported correctly.
 - d. MSU’s Foreign Tax Specialist will receive a copy of the Trainee/Fellowship Appointment Termination/Modification form for any non-US citizens in order to adjust any required tax reporting.
 - e. The completed Trainee/Fellowship Appointment Termination/Modification form will also be received by Accounts Payable (UBS AP).
3. If the appointment is being terminated:
 - a. UBS AP will cancel all future entries in Banner and will attach the term/mod form in EDM where necessary.
 - b. FSS/departmental accountant will edit associated financial reports.
4. If the appointment is being modified:
 - a. UBS AP will cancel all future entries in Banner and will attach the term/mod form in EDM where necessary.
 - b. FSS/departmental accountant will edit associated financial reports and submit a new BPA showing only new, modified payments.
5. If any payments were issued to the trainee/fellow in error, the appointing department will need to recover payment and submit check or cash to FSS or the departmental accountant for abatement.
 - a. Please note, if the erroneous payments were on a grant or IDC, the payments will need to be moved to a non-grant or non-IDC index and abated there.
6. To modify/terminate an appointment, Trainee/Fellowship Appointment Termination/Modification form must be received by fellowships@montana.edu by the 15th day of the month preceding the change date. The requestor will need to ensure that the form progresses through the first two steps (“PI or Fund Authority” signature and “OSP FM or Dept Head/Director” signature) of the DocuSign queue in a timely fashion.
 - a. Trainee/Fellowship Appointment Termination/Modification forms received after the 15th of the month preceding the appointment begin date will be processed as quickly as possible.
7. Any questions regarding trainee and fellowship terminations, modifications or payments should be directed to fellowships@montana.edu.