JOB AID FOR TERMINATION FORM

Purpose: To end the postdoctoral appointment, including medical benefits and tuition charges

Confidentiality: Information entered in Postdoc Web Forms is part of Student Records. Confidential or sensitive information should not be entered into PD Web Forms.

In AXESS: OPA/Bechtel Center Tab > Postdoctoral Administrative Forms > Termination Form
OR: CS Admin > Campus Community > STF Postdoc > Postdoc Transactions > STF Postdoc Termination

1. **To create a new Termination Form, click "Add"**
   a. BIO DEMO BOX
      i. Student ID Field: Enter the student ID number, OR
      i. Click the magnifying glass to "Look Up" the student ID
         1. In the Look Up Box enter the postdoc surname in the Last Name Field, click "Look Up"
         2. From Search Results, click the name of the postdoc
         3. The Bio Demo Fields are populated
   b. DATES OF APPOINTMENT BOX
      i. New End Date Field: Enter the last day of the postdoc appointment
      ii. Action Reason Field: Click the magnifying glass
         1. In the Look Up Box, click "Look Up"
         2. From Action Reasons, click the most appropriate reason for the appointment ending
            a. **PACC - Accepted another position (use when postdoc ends appointment early to take another position)**
            b. **PDEP - Department Transfer (use when postdoc is transferring to a new postdoc position in another Stanford department)**
            c. **PEAR - Early Termination (use when the PI or department ends appointment early due to loss of funding, program change, or poor postdoc performance. See required Early Termination procedures: https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/early-termination-appointing-department-move-policy)**
            d. **PEND - End of Appointment Term (use when postdoc has substantially completed the appointment term)**
            e. **PPER - Personal/Family Reasons (use when postdoc ends appointment early for personal or family reasons)**
            f. **PQWN - Quit without Notice (use when postdoc ends appointment early without notice)**
            g. **PRES – Resignation (use when postdoc resigns appointment early)**
            h. **RRTN - Failure to Return from LOA (use when postdoc fails to return from an approved leave of absence)**
   c. FORWARDING INFORMATION BOX
      i. Address Line 1 Field: Enter the postdoc's forwarding street address
      ii. Address Line 2 Field: If needed, enter any additional street address information
      iii. City, State, Postal Code Fields: Enter the new city, state, and zip code
      iv. Email ID Field: Enter the postdoc's new email address (CANNOT BE @stanford.edu address)
      v. Phone Field: Enter the postdoc's new phone number
   d. PROFESSIONAL INFORMATION BOX
      i. New Position Title Field: Enter the title of the postdoc's new position
      ii. Type of Position Field: Click the magnifying glass

1. In the Look Up Box, click “Look Up”
2. From Search Results, click the most appropriate position description

iii. New Institution or Company Field: Enter the name of the institution or company

iv. FOREIGN SCHOLARS BOX – These fields are auto-populated

v. CERTIFICATE OF TRAINING BOX

1. Certificate of Training Requested Field: Click the drop down arrow, select “Yes” or “No”
2. If “Yes” is selected, more entry fields appear for completion
    a. Salutation Type Field: Click the drop down arrow and click the salutation type
    b. Name to appear on Certificate Field: Enter the name to appear on the Certificate (if different from the postdoc’s official name)
    c. Comments Regarding Certificate Field: Enter any comments or instructions

e. COMMENTS TO APPROVERS AND OPA BOX
    i. Enter any additional comments (comments are visible to all, including the postdoc)

f. “I UNDERSTAND THAT” CHECKBOX
    i. This box must be checked to proceed with the form

g. Click “Save” to save the form and return later; OR click “Submit” to route the form for approval

h. An email notification is automatically generated to the Postdoc

2. To search for a previously saved or submitted Termination Form

a. From Postdoctoral Administrative Forms, click the “Termination Form” radio button

b. To search for all Termination Forms, click “Search”

c. To search for a specific Termination Form:
    i. In the search criteria fields, enter the postdoc’s First and Last Names, click “Search”
    ii. From Search Results, click the Transaction ID of the Termination Form

3. Late Terminations = Insurance Charges to Department

a. COBRA regulations require plan administrator must be notified within 30 days of a termination

b. Insurance carrier billing is pulled on the first of each month

c. Postdocs who are not termed by the last day of the month are considered active on the first day of the following month

d. To avoid paying health premiums beyond the termination date, an approved Termination Form must be received by the Postdoc Benefits Office by 3pm on the last day of the month of termination

e. Termination Forms received 25 days or more after the termination date will have a termination date of the last day of the current month

f. Late terminations are captured on the following months billing

g. Any monies returned from the carrier are credited back to the department with the next department charge billing

h. **No longer able to refund premiums beyond the current month**