



Exit Process Checklist for Employees

The purpose of the exit process is to support the transition of employees leaving County employment. This section outlines the necessary steps employees must complete before leaving County employment. Employees are responsible for returning all County property to their immediate supervisor (or department designee) prior to their separation from County employment.

The following checklist is provided for employees:

Status	Action Steps for Exiting Employees
	<p>1. Submit a Letter of Resignation. You should write and submit a letter of resignation to your immediate supervisor.</p>
	<p>2. Complete Confidential Exit Survey. You may receive a link to complete an anonymous exit survey at your County email address from the following sender: Surveys@Pulse.gartner.com. As an exiting employee, participation in an exit survey is voluntary, but highly encouraged. It will provide valuable feedback regarding the work environment in the County. Feedback will assist the County in identifying changes that may be needed to improve the workplace.</p>
	<p>3. Contact OHR Health Insurance Team. Before leaving County employment, you should contact the Health Insurance Team by placing a service request with MC311 at 240-777-0311 and request a call back to discuss retirement group insurance matters. Retiring employees must also sign up to attend the class <i>Enrolling in Health Insurance Benefits at Retirement</i> no later than 60 days before their planned retirement date. Dates for classes can be found on the OHR Retirement Planning Webpage.</p>
	<p>4. Review MCERP Retirement Benefits Checklist or Contact MCERP. The MCERP website has a checklist for employees concerning their retirement benefits upon separation from County employment. You can also contact: retirement@montgomerycountymd.gov. Employees planning to retire should also follow the steps below depending on which plan(s) they are enrolled in:</p> <p>Employees' Retirement System (ERS) Pension: Register and attend the <i>ERS Planning for Retirement</i> seminar 90 days before your retirement date, run your pension estimate 90 days before your retirement date, and submit your retirement application through MCERP's online portal at least 60 days before your retirement date at https://eportal.montgomerycountymd.gov/goto/ERSRetiree/.</p> <p>Retirement Savings Plan (RSP)/Guaranteed Retirement Income Program (GRIP): Register for OHR's <i>Enrolling in Health Insurance Benefits at Retirement</i> seminar at least 90 days before your retirement date to attend the seminar 60 days before your termination date. Make a one-on-one appointment with the Fidelity representative to discuss your distribution options with your retirement account. The OHR Retirement Planning Website is: Retirement Planning (montgomerycountymd.gov).</p>
	<p>5. Financial Disclosure. If you are required to file a financial disclosure statement under the provisions of the County Code, you must file the statement for the calendar year (up to the date of departure) during which you separate from the County. The Financial Disclosure Online Filing system is located at: www.montgomerycountymd.gov/financialdisclosure/.</p> <p>Failure to submit a financial disclosure statement upon resignation will cause a delay in processing your final paycheck.</p>



	<p>6. Understand the Ethics Laws Post-Employment Requirements:</p> <p>Permanent Bar. Former County employees must not work with or assist any party other than a County agency in a case, contract, or other specific matter if the employee significantly participated in the matter as a public employee.</p> <p>One Year Bar on Certain Employment. For one year after the effective date of termination from County employment, a former public employee must not enter into any employment, understanding, or arrangement (expressed, implied, or tacit) with any person or business if the public employee significantly participated during the previous 3 years: (1) in regulating the person or business; or (2) in any procurement or other contractual activity concerning a contract with person or business (except a non-discretionary contract with a regulated public utility).</p> <p>Protection of Confidential Information. Former County employees may not disclose any confidential information relating to or maintained by a County agency that is not available to the public. Also, a former employee may not use confidential information for personal gain or the gain of another.</p>
	<p>7. Service Requirements for Voluntary Participation in Training and the Tuition Assistance Program. Ensure that you have met all service requirements and have no financial obligations after participating in external voluntary training or the County's tuition assistance program. For information about the tuition assistance program, visit the Tuition Assistance Program webpage. For information about service requirements for voluntary external training, visit Montgomery County Personnel Regulations Employee Development Section 14-2(b): MCPR Section 14 Employee Development.</p>
	<p>8. Property Separation Checklist. You must return all pertinent County items to your supervisor at the time of the exit meeting or when requested. These items have been identified as noted on the <i>Property Separation Checklist</i>. You must also sign the <i>Property Separation Checklist</i>.</p>
	<p>9. Change of Address. If you are moving to a new location, send the new mailing address via email to OHR Records Management at records.ohr@montgomerycountymd.gov. This change of address will enable County Payroll to send your W-2 Form to the correct address the following January. If you are retiring, you employee should also complete and submit the Montgomery County Employee Retirement Plans (MCERP) Change of Address or Name Form. MCERP will share the change of address with OHR Health Insurance to ensure that all insurance carriers are notified, and to verify if you need to change your medical insurance plan based on the new address.</p>

Note: Employees and supervisors should follow internal departmental exit procedures, which for some departments may differ from the steps outlined above.